Chapter 5   Benefits Management

✔ Employee Benefits Enrollment

This procedure will outline, in detail, the steps required to enroll a newly hired employee into the various benefit plans for which they are eligible. There are three preliminary steps required before we can start the actual benefit enrollment process.

Not all employees will need all three infotypes. Only create those that are applicable to each employee.

We must manually create three infotypes to set the foundation for the benefit enrollment:

- **Infotype 9003** - Retirement Plan Data at Termination, Preview Retirement Information
- **Infotype 0376** – Benefits Medical Information
- **Infotype 0021** – Family/Related Person

Use the following menu path or transaction code to start the process:

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > MASTER DATA > MAINTAIN**

Transaction code: **PA30**

We have entered a Personnel ID number in the Direct selection part of the window, and the infotype that we wish to create, in this case, infotype 9003 – <u>Retirement Plan Data at Termination.</u>.

This step is critical for an employee in order to capture the information that is on the retirement application concerning previous retirement information.

Click the Create Icon   on the toolbar.

Field Name	Description	R/O/C	User Action/Values
From Date	The starting date of the plan enrollment	R	Enter the Starting date or use the dropdown arrow to select
To Date	The end date of the employee participation	R	The field will default to 12/31/9999. **Do Not Change**
Previous participation in plan	Were they in the plan before?	R	Enter Y or N to answer whether the employee was in the plan before
If Yes, Retirement plan option	User defined	C	If the answer to the previous question was Yes, use the dropdown arrow to select the appropriate answer from the following choices: A – Cash Surrender B – Paid up Annuity D – Discontinue
If discontinue, Date	User defined	C	If the answer to the previous question was "Discontinue", you must enter the date of the discontinuance. The employee may stop a Retirement Plan deduction at any time voluntarily.

When the inputs are correct, Click the Enter icon

You will be reminded to Save your entries. Do so by clicking on the Save icon   .

The second of the three infotypes to be manually created is infotype 0376 – <u>Benefits Medical Information.</u> This is where the employee's physician name and other related information is stored.

The number 0376 is entered directly into the infotype field in the Direct selection part of the window as we have done with the first infotype.

Click the Create icon ☐ again to open the following pop up window.

At the <u>Create Benefits Medical Information</u> screen, the following inputs are required.

Field Name	Description	R/O/C	User Action/Values
From	Date of the benefit enrollment	R	Enter the begin date of the enrollment
Physician's Name	Name of the Primary Care Physician	R	Enter the Primary Care Physician
Physician ID	ID Number of the Primary Care Physician	R	Enter the ID Number

Click the enter icon ☑ to validate the entries and the click the Save icon ☐ to save the transaction.

NOTE: The physician is only used for initial enrollment into SAP. The physician name will be maintained with the provider from that point on.
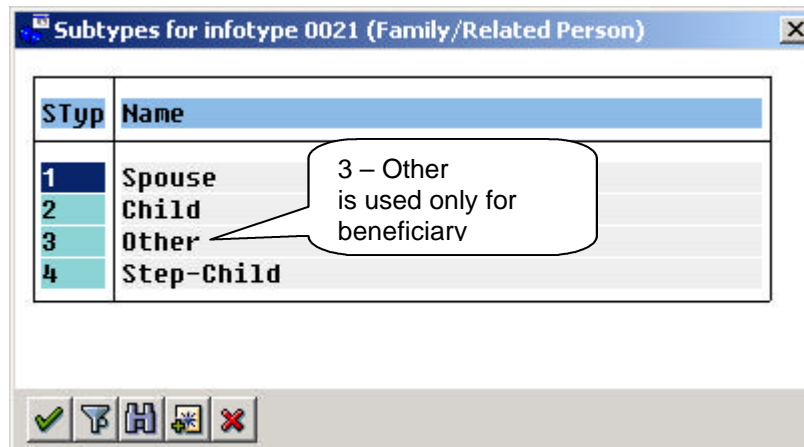
All dependent information will be kept in SAP except the physician information. Any Add, Change or Stopping of dependents will go through the Human Resources module.

The initial beneficiary must be in SAP, but changes to an existing beneficiary will be done by the provider.

The third and final of the manually entered infotypes is 0021 – <u>Family/Related Person</u> Directly enter infotype 0021 into the field as we have done for the two previous infotypes

and click the Create icon 〔□〕.

With this infotype, you will see an interim pop-up window asking for additional information as shown below.

Choose the Family/Related person that we are creating the infotype for. In the example that we are using, we highlight 1 – Spouse and click the green check mark.

Field Name	Description	R/O/C	User Actions/Values
From Date	Effective date of the benefit enrollment	R	Enter the effective date and leave the "To Date" as 12/31/9999"
Family type	Relationship	R	This field will be defaulted based on the subtype chosen in the pop-up window menu
Last Name	Last name of the beneficiary or dependent	R	Enter the last name.
First Name	First name of the beneficiary or dependent	R	Enter the first name
Gender	Female or male	R	Click the radio button next to the correct selection
Birth Date	Birth date of dependent. Birth date of beneficiary not required	R	Enter the birth date as required.

SSN	Social Security Number	R	Enter the Social Security Number of the dependent or beneficiary
Street/City/State Zip/Country	Permanent Address	R	Address of the dependent or beneficiary
Physician	Physician of the dependent	R	Enter the Primary Care Physician of the dependent
ID Number	Physician ID number	R	Enter the dependent's Primary Care Physician ID Number.
Status	Student	C	Required if dependent is over 19 years of age
Challenge	Whether the dependent is disabled/ handicapped.	C	Check if the dependent is disabled/ handicapped.

Once the screen is completed, Click the enter icon to validate the entries and the

click the Save icon to save the transaction.

After completing all the dependents and/or beneficiaries, follow the menu path or transaction code to begin the actual Benefit Enrollment process. (See next page.)

✓ Benefit Enrollment Process

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT >
BENEFITS > ENROLLMENT**

Transaction Code: **HRBEN0001**

Enter the information for this screen based on the table below.

Field Name	Description	R/O/C	User Action/Values
Key Date	Effective date of benefits	R	If you are enrolling an employee on the current date, the button to the left of "Today" will be depressed and no change will be necessary. If you are enrolling at a later time, depress the button to the left of "Other keydates," tab to the input field and enter the enrollment date using the format MM/DD/YYYY. **This date must be the date the employee signed the forms.** Enrollment must be within 31 days of hire date.
Selection	Personnel Number	R	Enter the employee's personnel number and click the Execute icon on the application toolbar

You are now at a screen labeled "Enrollment Offers."
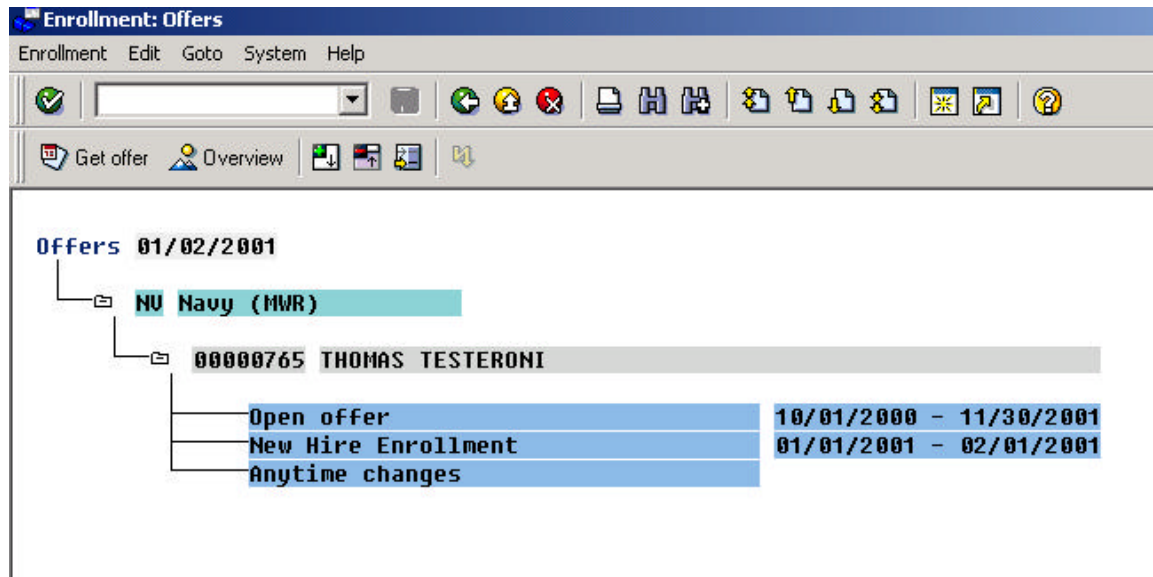
Highlight the line reading **"New Hire Enrollment"** and click on the pushbutton labeled

Get Offer [Get offer] **OR** highlight the line reading **"New Hire Enrollment"** and double click.

The next screen will list all the plans that the employee is eligible for. This is the point where we can start the enrollment process.

```
Enrollment: Plan selection                                    _ 日 ×
Plan  Edit  Goto  System  Help

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  ⊕ Enroll  圏 ⊚  ⊗ Overview │ 凹 圏 凹 │ ⊌

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  Offer as of                02/14/2001      New enrollment dates

     ⊟ Dental
         └── Aetna Dental              02/14/2001 - 12/31/9999

     ⊟ Medical
         ┌── Aetna Medical            02/14/2001 - 12/31/9999
         └── HMO Cigna Medical        02/14/2001 - 12/31/9999

     ⊟ Basic Life/AD&D
         └── Basic Life / AD&D        02/14/2001 - 12/31/9999

     ⊟ LTD
         └── Long Term Disability     02/14/2001 - 12/31/9999

     ⊟ Optional Life
         └── Optional Life            02/14/2001 - 12/31/9999

                                            DV2 (1) (200) ▼  mwrsap5  INS  10:30
```

> **This is a partial listing of the various benefits that this employee is eligible for.**

✎ | **NOTE**: Employee must be enrolled in medical in order to be enrolled in dental. Dental appears first on enrollment list, and you can click first and accept, then click on medical to enroll employee.

The procedure for enrolling employees into any of the eligible plans is essentially the same. The first step is to highlight the plan and double click on the line. The first screen, which is typical of all of the benefit enrollment windows, is the <u>Maintain Health Plan</u>.

Field Name	Description	R/O/C	User Action/Values
Option tab	To select plan option and dependent coverage	R	Option field will default with the dental plan. Click on the dropdown arrow on the field labeled **Dependent cov.** and click on the coverage the employee has selected. The employee cost will automatically appear
Dependent folder tab	Dependents to be covered	R	Click on the Dependent folder tab to open. Click on the button to the left of each dependent's name. If there are no dependents, this tab will not appear. If no dependents are checked, they will not be enrolled through the interface.

Click the accept icon at the bottom of the pop-up enrollment window, the window closes and you will then return to the **Enrollment Plan Selection** screen.

Highlight and **double click** on the next indented plan in which you are enrolling the employee. We are showing the selection of Basic Life Insurance.

We enter and check the information as specified in the table below:

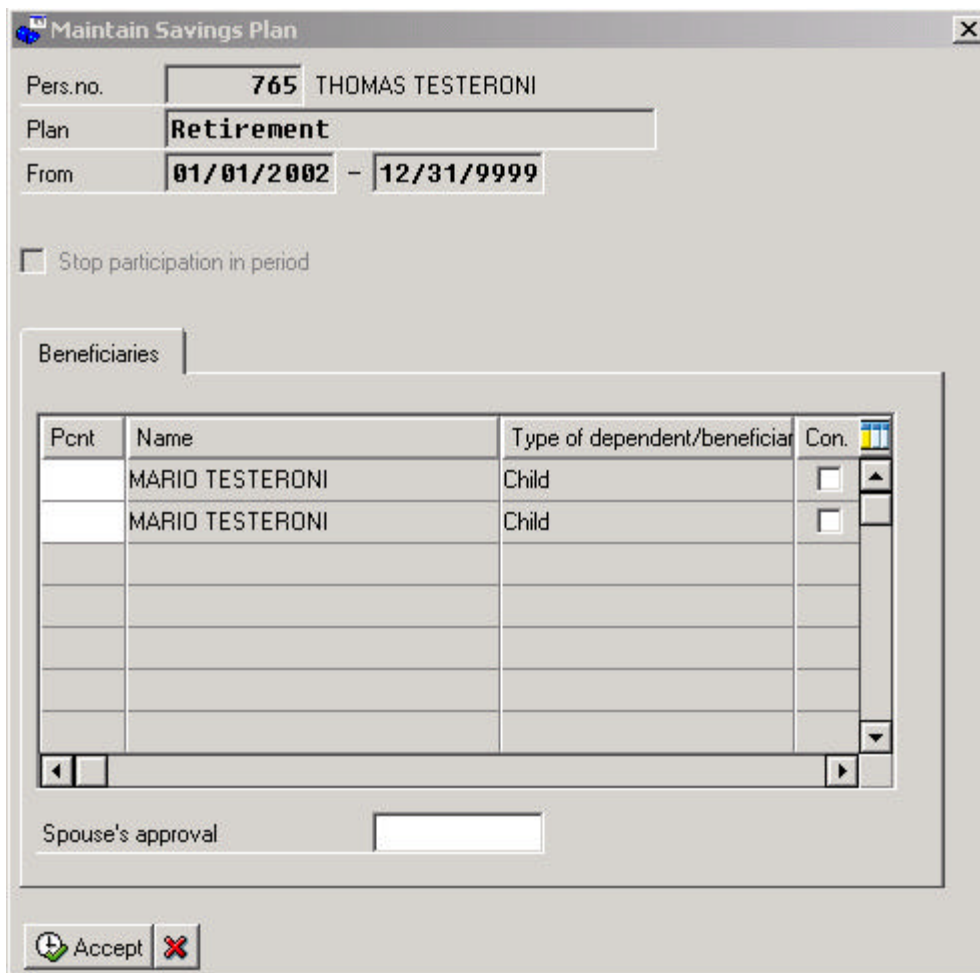| Field Name	Description	R/O/C	User Action/Values
Coverage tab	To select Basic Life/AD&D coverage	R	Insurance option defaults this plan. Input 2000 into the "**Addtl units**" field. **This field is configured to accept nothing else**. You will note that the Employee cost will automatically appear.
Beneficiaries tab	Input field	R	Click on the "Beneficiary Folder" and enter the percentage % of the benefit to be assigned each dependent.

Click the accept icon ⊕ Accept on the bottom of the pop-up window, the window will close and you will be returned to the "Enrollment Plan Selection" screen.
Continue to highlight and double click on each of the indented plans in which you are enrolling an employee and proceed with each benefit enrollment following the same procedures as described above.

For example, for **Long Term Disability Insurance**:

Click on the dropdown arrow on the **Ins. Option** line. Select either Long Term Disability or LTD Paid up.

> Note: If choosing the Long-Term Disability option, the employee cost will appear. If choosing the Paid up option, the amount will be zero.

Click the accept icon ⊕ Accept on the bottom of the pop-up window, the window will close and you will be returned to the "Enrollment Plan Selection" screen.

The next example of the procedures is illustrated using the **Optional Life** enrollment.

Enter the appropriate information on the Coverage and Beneficiaries tabs. Click the Accept ![Accept] icon and you will be returned to the "Enrollment Plan Selection" screen.

The next example of the procedures is illustrated using the **401K Savings Plan** enrollment.

The inputs for this **Maintain Savings Plan** screen are as follows. The table below explains the inputs for all three of the folder tabs.

Tab Names	Description	R/O/C	User Action/Values
Contributions Regular	Pre-tax, bi-weekly contribution	R	Percentage. Enter a percentage amount between 1 – 15%. The system will generate an error if the percentage is over 15%.
Investments	Input field. This must be selected for new enrollments. Changes will be handled directly by the vendor.	R	Click on the **Investments** tab. Enter the percentage of investments applicable to each plan. Percentages must total 100%
Beneficiaries	Input field. This must be selected for new enrollments. Changes will be handled directly by the vendor.	R	Click on the **Beneficiaries** tab. Enter the % of the benefit to be distributed to each beneficiary. If the beneficiary is someone other than a spouse, the date must also be entered in the Spousal Consent field.

Click the Accept icon [⊕ Accept] on the bottom of the pop-up window, the window will close and you will be returned to the "Enrollment Plan Selection" screen.

> ✏️ **NOTE**: The date of enrollment for this benefit is the beginning date of the next quarter.

You will proceed through the balance of the remaining available benefit selections in exactly the same way.

The next example shows the Retirement option.
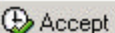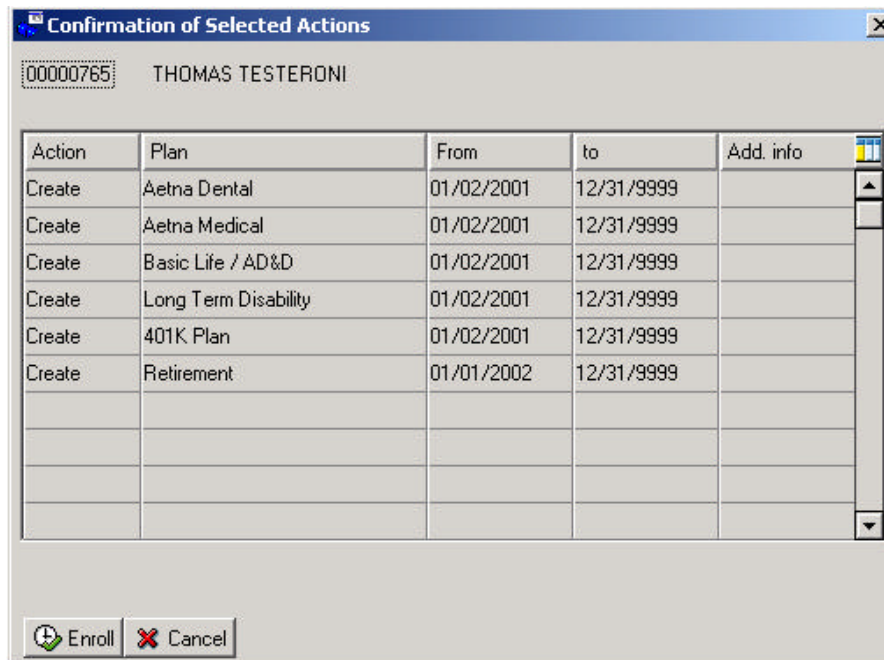
If the employee is married and the beneficiary is someone other than spouse, you must have written spouse approval. Enter the date the form was signed in the "Spouse's approval" field.

Enter the percentage for each beneficiary, designate a contingent beneficiary by clicking the checkbox (if desired), then click the Accept [⊕ Accept] icon.

Notice that each time you finished a "**Benefit Enrollment**" and returned to the **"Enrollment Plan Selection"** screen, a green "check mark" appears to the right of each completed action.

When all the enrollment actions have been completed, click on the Enroll icon [⊕ Enroll] on the applications toolbar.

You will now see a pop-up screen labeled **Confirmation of Selected Actions**. This window will show you a list of all the enrolled benefits and their effective dates.

If all the information is correct, click on the Enroll pushbutton on the bottom of the pop-up window. If not, click Cancel, correct the entry and click Enroll again.

You will see another popup window verifying that the enrollment has been completed successfully.
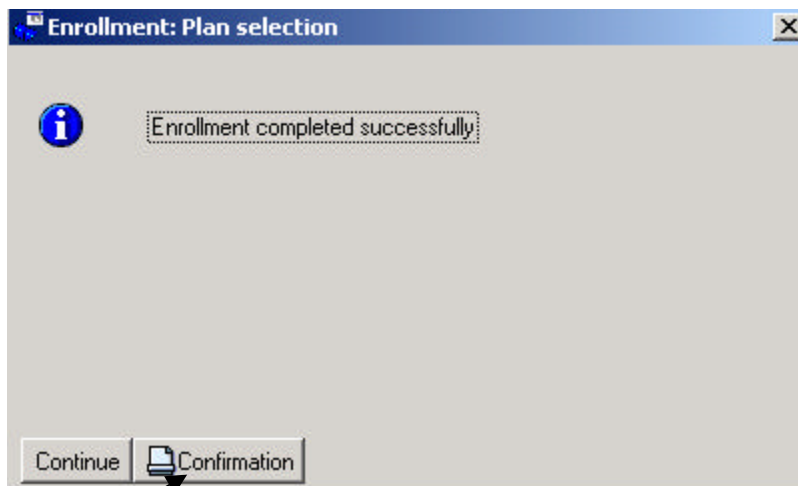
At this point, if you are connected to a printer and the employee wants a printed confirmation of all the enrollments, click the Confirmation icon at the bottom of the window or if you are finished, click on the "Continue" button.

You are returned to the **Enrollment: Offers** screen. Select the to return to the

"Offer type for enrollment" screen to enroll another employee. Click the Exit icon on the Standard toolbar to return to the **SAP Easy Access Screen**.

✔ Employee Changes to Benefit Coverage

When an employee has married, has a new child, divorces or has a change of circumstances that necessitate a change in some or all of his/her benefit coverage, this document describes the steps required to make the changes necessary to his/her benefits.

Only plans applicable to the life-changing actions may be modified. If the change involves adding new dependents, add them through infotype 0021 <u>Family/Related person</u> if applicable. If a dependent is no longer eligible, enter an End date to the record.

IF	THEN
The employee is involved in a position change or a transfer action	Access the system using the menu path: HUMAN RESOURCE > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS (**See Step One**)
The employee has a life-changing action (i.e., Divorce, birth or adoption of a child, death of a spouse, etc.)	Access the system using the menu path: HUMAN RESOURCE > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > MAINTAIN Transaction Code: PA30 (**See Step Two**)

Step One: You are completing the position change for an employee. This action can be used when an employee is changing from a benefit non-eligible position to an eligible one. Infotype 0378 - <u>Adjustment Reasons</u> will roll as the last infotype to complete. Once the personnel action has been completed, you can complete the Benefit Enrollment.

Step Two: This option will be used when an employee has a life-changing action of marriage, birth or adoption of a child, divorce or the death of a spouse or dependent. Making changes via the Master Data Menu.

To Add a dependent

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > MAINTAIN**

Transaction Code: **PA30**

Field Name	Description	R/O/C	User Action/Values
Personnel Number	Personnel number of the employee	R	Enter the personnel number of the employee, if known. Use the dropdown arrow to select in not known.
Infotype	The number of the infotype to be created	R	Enter the Infotype number into the Direct Selection field or click on Family Related Person. In our example we are entering infotype number 0021 – Family/Related Person.

After clicking the Create icon, you will be shown a pop-up window offering choices as to the type of dependent that you wish to add.
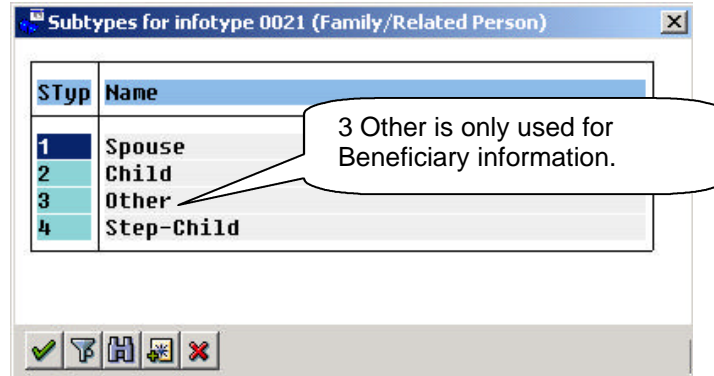
You double click on the selection or choose the subtype (i.e., spouse, child, other, etc.) and click the green check mark. For our example, we are choosing the subtype: Child.

Screen: Infotype 0021 -Create Family/Related Person

The table below will describe the information that we have used to fill out the infotype correctly. In our example, we added a child as a dependent.

Field Name	Description	R/O/C	User Action/Values
From date	Effective date of the benefit	R	Enter the effective date. Leave the "To Date" as the default 12/31/9999
Family type	Relationship	R	This will default based on the subtype chosen on the pop-up window.
Last Name	Last name of the dependent or beneficiary	R	Enter the last name of the dependent
First Name	First name of the dependent or beneficiary	R	Enter the first name of the dependent
Gender	Male or Female	R	Check the radio button next to the correct choice
Birth date	Birth date of the dependent	R	Enter the birth date of the dependent. A beneficiary birth date is NOT required.
SSN	Social Security Number	R	Enter the Social Security Number of the dependent or beneficiary.
Street/City/State/ Zip/Country	Permanent Address	R	Enter the address of the dependent or beneficiary
Physician	The dependent's physician	R	Enter the Primary Care physician of the dependent
ID Number	Physician ID Number	R	Enter the ID number of the physician.
Status	Student	C	Required if dependent is over 19 years of age
Challenge	Whether the dependent is disabled/ handicapped.	C	Check if the dependent is disabled/ handicapped.

Press the enter key or the green check mark to verify the accuracy of the entries and click the Save icon to save the record. You may now use the to return to the SAP Easy Access Menu.

To Change dependent information:

This option will be used when an employee has a life-changing action (e.g., divorce, death of a dependent, over-age dependent, etc.).

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > MAINTAIN**

Transaction Code: **PA30**

Field Name	Description	R/O/C	User Action/Values
Personnel Number	Personnel number of the employee	R	Enter the personnel number of the employee, if known. Use the dropdown arrow to select if not known.
Infotype	The number of the infotype to be created	R	Enter the Infotype number into the Direct Selection field or click on Family Related Person. In our example we are entering infotype number 0021 – Family/Related Person. OR you may also click on the box next to the Action Type line labeled Family/Related Person.

Click on the document Overview icon . This accesses the **List Family Related Person** screen as shown on the next page.

Click the box beside the name of the dependent that you wish to change. In our example, we have checked the box next to the spouse, Angelina Testeroni.

We now click the change icon (the pencil).

You should now be at the screen titled "**Change Family Related Person**".

Screen: Change Family Related Person

In the "To" field, as shown on the screen, change the field to reflect the date of the change (e.g., the divorce date).

Click the Enter key or the green check mark ⊘. You will receive a message stating the date of the record has been delimited. Enter again to accept the change.

Click on the Save icon 💾.

You will now be back to the **List Family Related Person** screen. You may now use the green back arrow ⬅ to return to the **Maintain Master Data** screen.

> **NOTE:** A time saving tip for processing a large number of these changes, would be to create/change all the dependents and/or beneficiaries for the employees before proceeding to the next step.

After creating and/or changing all dependents and/or beneficiaries, we must manually create infotype 0378 – <u>Benefit Adjustment Reason.</u>

This infotype will be required before attempting any enrollment into the benefit plans.

Field Name	Description	R/O/C	User Action/Values
Personnel Number	The employee's personnel number	R	Enter the Personnel number of the employee. If you do not know, click the down arrow and do a search based on the employee's social security number.
Infotype	The number of the infotype to be created	R	Enter the infotype – 0378 or click on the Benefit tab and click the box next to the Benefit Adjustment Reason.

Click on the Create icon on the toolbar. You should now see the screen **"Create Adjustment Reason"**

Enter the information in the fields as specified on the table below.

Field Name	Description	R/O/C	User Actions/Values
From date	Effective date of the benefit change.	R	The field will default from the current date. Enter the effective date of the life-changing action (e.g. birth of a child), It must be within 31 days. Leave "To Date" as 12/31/9999.
Benefit area	Benefit area	R	This will default to Navy MWR and can not be changed.
Adjustment Reason	Reason for the life-changing action	R	Use the dropdown arrow to select **Family Status Change** or **HIPAA Certificate**. A pop-up window labeled "**Deviation from end date**" asks "Do you want to replace the current end date with the calculated end date?" Click on the **YES** button.

Click the Enter key or the green check mark [✓]. Save your entries by clicking on the Save icon [💾].

[✎]	**NOTE**: After creating/changing all dependents and/or beneficiaries (using infotype 0021) and the Benefit Adjustment Reason (using infotype 0378), use the menu path below to begin the Benefit Enrollment Process.

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > BENEFITS > ENROLLMENT**

Transaction Code: **HRBEN0001**

Enter the information in the fields as specified in the table below:

Field Name	Description	R/O/C	User Action/Values
Key date	Effective date of the benefits	R	Enter the date of the effective benefit enrollment, either the date of the personnel action or the date of the life-changing action.
Selection	Personnel number	R	Enter the employee's personnel number or use the dropdown arrow to select.

Click the Execute icon [🕐] to open the screen labeled "**Enrollment Offers**"
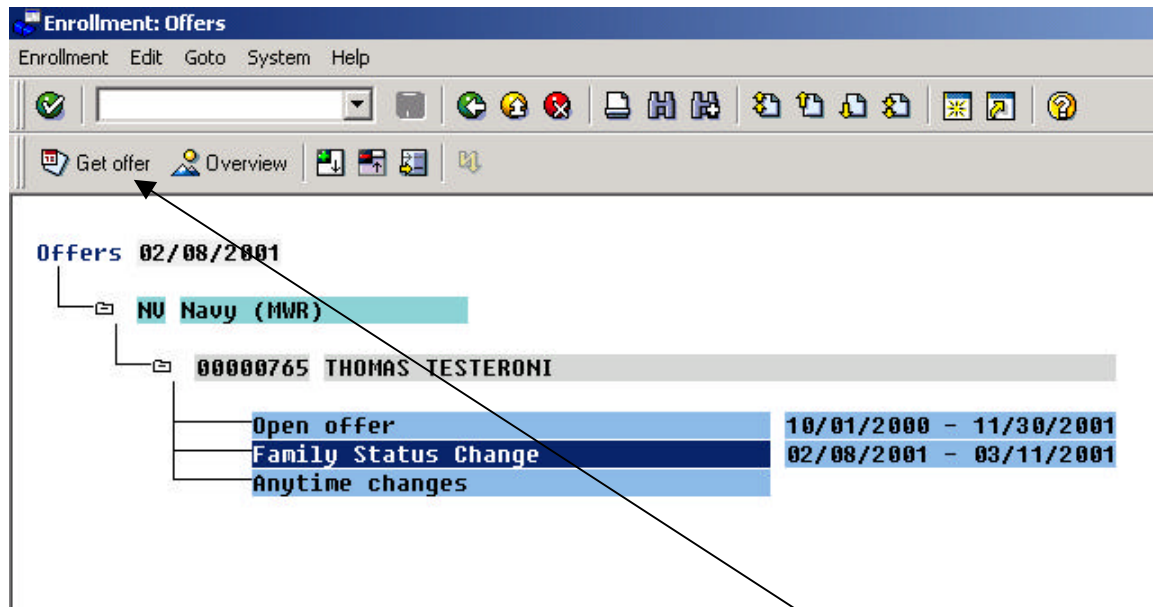
Highlight the line "**Family Status Change**" and click on the "**Get offer**" pushbutton on the toolbar, or highlight "**Family Status Change**" and double click on it.

You are now at the **"Enrollment: Plan Selections"** screen.

> NOTE: The screen above lists all the plans in which the employee is currently enrolled (marked by a green circle) and which may be changed based on the adjustment reason. You may now start the enrollment change process. Only applicable changes can be made.

The process to change is essentially the same as the process for the original enrollment.

Field Name	Description	R/O/C	User Action/Values
Option folder tab	To select the option of medical coverage	R	Option field will default with the chosen plan and cannot be changed.
Dependent Coverage	To select appropriate coverage	R	Click on the dropdown arrow and select the type of coverage preferred. (Family, Employee Only, Single, etc.) You will note that the employee cost will appear.
Dependents folder tab	Dependents to be covered	R	Click on the tab to open the folder. Click on the button to the left of each dependent(s) you are enrolling in coverage or removing from the plan. Clicking to remove the check mark deletes the dependent. Note: if there are no dependents, this tab will not be visible.

An illustration of how the process works is shown on the Maintain Health Plan window above. We have removed the check mark from the select field shown to the left of the named dependent for the line with the Name "Angelina Testeroni" on it. This will

remove coverage for Angelina because of the divorce. Click the Accept icon ⏱ Accept on the bottom of the window.

We return to the **Enrollment Plan Selection** screen again.

Continue to **highlight** and **double click** on any of the indented plans for which you wish to make changes. The only changes that you will be allowed to make to the following insurance plans will be to the beneficiaries.

- Basic Life/AD&D Insurance
- Optional Life
- Long Term Disability
- 401K Savings Plan
- Retirement

Notice that each time you finished a "**Benefit Enrollment**" and returned to the **"Enrollment Plan Selection"** screen, a "check mark" appears to the right of each completed action.

When all the enrollment actions have been complete, click on the Enroll icon ⏱ Enroll on the applications toolbar.

You will now see a pop-up screen labeled **Confirmation of Selected Actions**. This window will show you a list of all the enrolled benefits and their effective dates.

If all the information is correct, click on the Enroll pushbutton [Enroll] on the bottom of the pop-up window.

You will see another popup window verifying that the enrollment has been completed successfully.

At this point, if you are connected to a printer and the employee wants a printed confirmation of all the enrollments, click the Confirmation icon at the bottom of the window or if you are finished, click on the "Continue" button.

You may continue on with another employee or, if you are finished, click on the Exit icon

[icon] on the standard toolbar to return to the SAP Easy Access menu.

Printing a HIPAA Certificate:

If there is a need to print a Health Insurance Portability & Accountability Act (HIPAA) certificate, follow these steps:

Menu path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > BENEFITS > FORMS > HIPAA certificate report**

After using the various report options as described in the chapter titled Reports, we decided to print only the HIPAA certificate for Personnel ID Number 765. Click the

Execute icon [icon]. You will be reminded to specify an Output Device (Printer) before the report will be displayed.

We clicked the Print preview icon to receive the following excerpt from the HIPAA certificate.

Certificate of Creditable Coverage (HIPAA)

Date certificate issued: 02/09/2001

IMPORTANT: This certificate provides evidence of your prior health coverage. You may need to furnish this certificate if you become eligible under a group health plan that excludes coverage for certain medical conditions. This certificate can be provided if medical advice, diagnosis, care or treatment was recommended or received for the condition within the 6-month period prior to your enrollment in the new plan. You may also need this certificate to buy for yourself or your family an insurance policy that does not exclude coverage for medical conditions before you enroll.

Person certified:

Name: TESTERONI, THOMAS   **SSN:** 414957812

Street address: 122 MAIN STREET
City: MEMPHIS   **State:** TN   **Zip:** 38133
Country: US

Relationship of certified person to employee: SELF
Emp. Name: TESTERONI, THOMAS   **SSN:** 414957812

☑ **Employee Benefit Termination**

This procedure will outline, in detail, the steps required to remove a terminated employee from the Benefit Plans for which he had been eligible.

Use the following menu path to begin the process.

Menu path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > BENEFITS > TERMINATION**

Transaction Code: **HRBEN0014**

Field Name	Description	R/O/C	User Action/Values
Key date	Date benefits are to be terminated— termination of benefits date MUST be the first day of the pay period that deductions are to stop	R	The "Today" button will be depressed. If benefits are to be terminated at a different date, depress the button to the left of "Other keydate" and enter the date benefits are to be terminated into the input field.
Selection	Personnel Number	R	Enter the Personnel number of the employee whose benefits are being terminated.

Click on the Execute icon ⌚.

You will see the next screen: *Termination Overview*
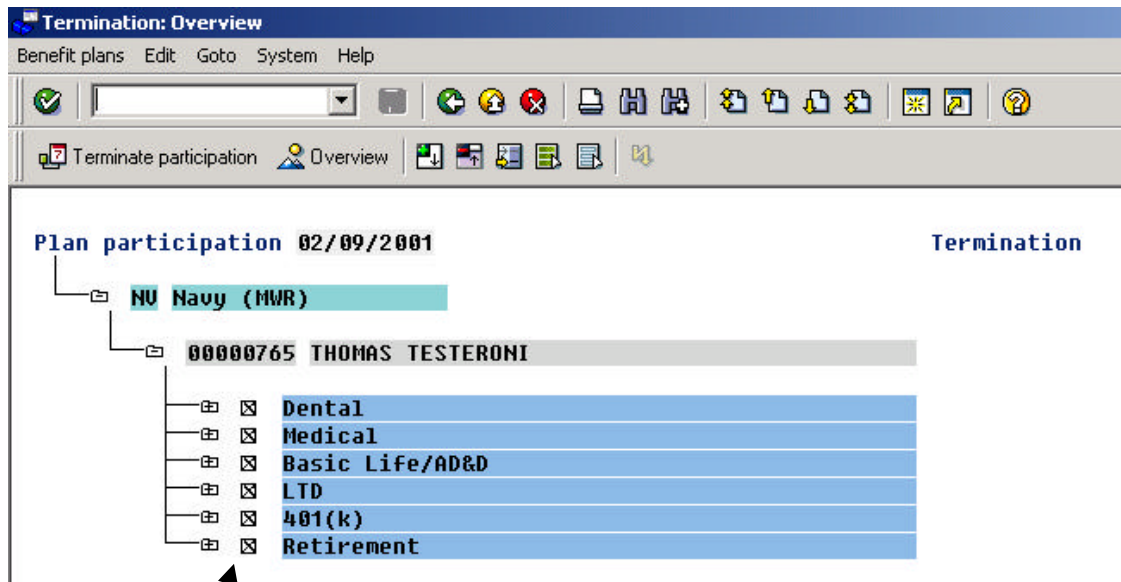
The screen gives you a listing of all the plans in which the employee is currently enrolled.

- If terminating all the benefit plans an employee is currently enrolled in, click on the

  Select all icon and all the small indicator boxes to the left of the plans are
  checked.

- If you are terminating an individual plan, click on the empty box to the left of the individual plans.

- A window will open verifying selected plans to be terminated.
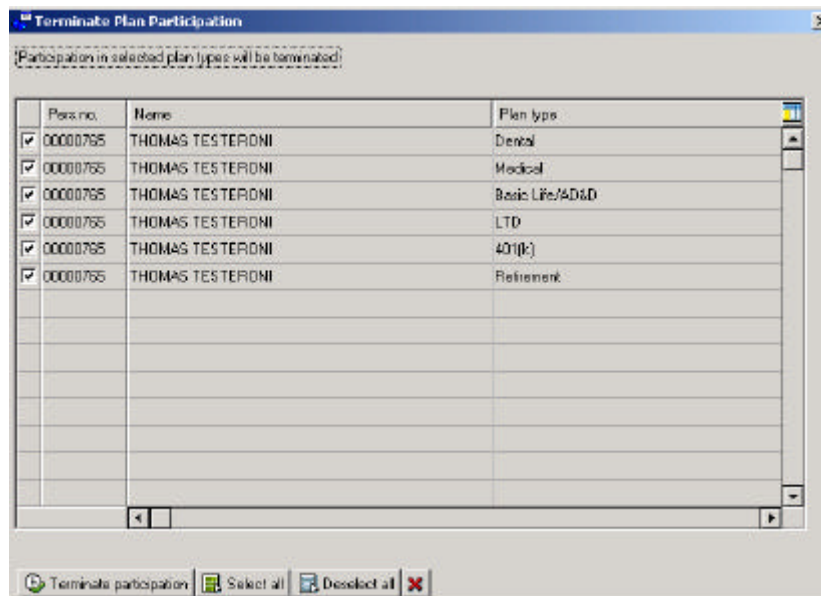
Click on the **Terminate participation** pushbutton ⊕ Terminate participation on the bottom of the window.

Another window will open with the message "For XXX of XXX plan types, plans have been delimited or deleted"
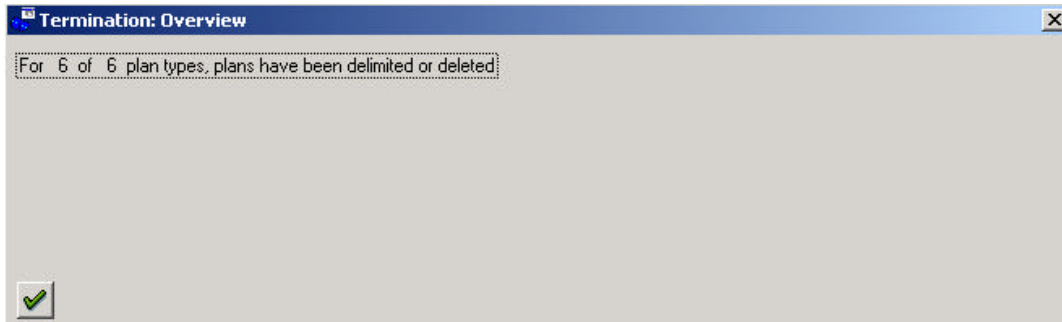
Click on the green check mark at the bottom of the window. The window will close and the benefit plans checked have been terminated as of the effective date entered.

We have expanded the entire Benefit Plan tree to show that each of the plans now has a termination date next to it. See the screen as shown on the next page.

Termination: Overview

Benefit plans   Edit   Goto   System   Help

Terminate participation   Overview

Plan participation 02/09/2001   Termination

    NV Navy (MWR)

        00000765 THOMAS TESTERONI

          □ Dental

            Aetna Dental   01/02/2001 - 02/09/2001 02/09/2001

          □ Medical

            Aetna Medical   01/02/2001 - 02/09/2001 02/09/2001

          □ Basic Life/AD&D

            Basic Life / AD&D   01/02/2001 - 02/09/2001 02/09/2001

          □ LTD

            Long Term Disability 01/02/2001 - 02/09/2001 02/09/2001

          □ 401(k)

            401K Plan   02/08/2001 - 02/09/2001 02/09/2001

Termination dates

Print a Confirmation of Termination Form

You can print a confirmation of the Termination of Employee Benefits. Follow these steps:

HR>PM>BENEFITS>FORMS>CONFIRMATION

Enter the date benefits were termination and the personnel number.

Click the Execute icon

This confirmation will show the termination dates and applicable benefits plans.

The termination process has been completed. Use the Exit icon to return to the SAP Easy Access screen. If there is a need to print a HIPAA certificate, follow these instructions:

1. In the command field, enter /NTHIPAA. Press the Enter key or click the green check mark.

2. You are at the HIPAA Log of Issued Certificates screen. Click on the Issue cert. push button. You will be shown the HIPAA Certificate report screen. Follow the guidelines from the previous chapter.

3. Enter the individual personnel number of run multiple ones by following the general report methods and techniques.

✓ Rehire Employee Benefit Enrollment

This procedure will outline, in detail, the steps required to enroll a **rehired** employee into the benefit plans for which they are eligible.

Use the following menu path to begin the process.

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > MAINTAIN**

Transaction code: **PA30**

We have entered a Personnel ID number in the Direct selection part of the window, and the infotype that we wish to create, in this case, infotype 9003 – <u>Retirement Plan Data at Termination.</u>

This step is critical for an employee in order to capture the information that is on the retirement application concerning previous retirement information.

Click the Create Icon ⬜ on the toolbar.

Field Name	Description	R/O/C	User Action/Values
From Date	The starting date of the plan enrollment	R	Enter the Starting date or use the dropdown arrow to select
To Date	The end date of the employee participation	R	The field will default to 12/31/9999. **Do Not Change**
Previous participation in plan	Were they in the plan before?	R	Enter Y or N to answer whether the employee was in the plan before
If Yes, Retirement plan option	User defined	C	If the answer to the previous question was Yes, use the dropdown arrow to select the appropriate answer from the following choices: A – Cash Surrender B – Paid up Annuity D – Discontinue
If discontinue, Date	User defined	C	If the answer to the previous question was "Discontinue", you must enter the date of the discontinuance. A Retirement Plan deduction may be stopped by the employee at any time voluntarily.

When the inputs are correct, click the Enter icon

You will be reminded to save your entries. Do so by clicking on the Save icon [ ].

The second of the three infotypes to be manually created is infotype 0376 – <u>Benefits Medical Information.</u> This is where the employee's physician name and other related information is stored.

The number 0376 is entered directly into the infotype field in the Direct selection part of the window as we have done with the first infotype.

Click the Create icon [icon] again to open the following pop up window.

At the <u>Create Benefits Medical Information</u> screen, the following inputs are required.

Field Name	Description	R/O/C	User Action/Values
From	Date of the benefit enrollment	R	Enter the begin date of the enrollment
Physician's Name	Name of the Primary Care Physician	R	Enter the Primary Care Physician
Physician ID	ID Number of the Primary Care Physician	R	Enter the ID Number

Click the enter icon [icon] to validate the entries and the click the Save icon [icon] to save the transaction.

> **NOTE**: The physician is only used for initial enrollment into SAP. The physician name will be maintained with the provider from that point on.
>
> All dependent information will be kept in SAP except the physician information. Any Add, Change or Stopping of dependents will go through the Human Resources module.
>
> The initial beneficiary must be in SAP, but changes to an existing beneficiary will be done by the provider.

The third and final of the manually entered infotypes is 0021 – <u>Family/Related Person.</u>
Directly enter infotype 0021 into the field as we have done for the two previous infotypes

and click the Create icon [ ] .

With this infotype, you will see an interim pop-up window asking for additional
information as shown below.

Choose the Family/Related person that we are creating the infotype for. In the example
that we are using, we highlight 1 – Spouse and click the green check mark.

Field Name	Description	R/O/C	User Actions/Values
From Date	Effective date of the benefit enrollment	R	Enter the effective date and leave the "To Date" as 12/31/9999"
Family type	Relationship	R	This field will be defaulted based on the subtype chosen in the pop-up window menu
Last Name	Last name of the beneficiary or dependent	R	Enter the last name.
First Name	First name of the beneficiary or dependent	R	Enter the first name
Gender	Female or male	R	Click the radio button next to the correct selection
Birth Date	Birth date of dependent. Birth date of beneficiary not required	R	Enter the birth date as required.

SSN	Social Security Number	R	Enter the Social Security Number of the dependent or beneficiary
Street/City/State Zip/Country	Permanent Address	R	Address of the dependent or beneficiary
Physician	Physician of the dependent	R	Enter the Primary Care Physician of the dependent
ID Number	Physician ID number	R	Enter the dependent's Primary Care Physician ID Number.
Status	Student	C	Required if dependent is over 19 years of age
Challenge	Whether the dependent is disabled/ handicapped.	C	Check if the dependent is disabled/ handicapped.

Once the screen is completed, Click the enter icon ✅ to validate the entries and the

click the Save icon 💾 to save the transaction.

After completing all the dependents and/or beneficiaries, follow the menu path or transaction code to begin the actual Benefit Enrollment process. (See next page.)

✅ Rehire Benefit Enrollment

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > BENEFITS > ENROLLMENT**

Transaction Code: **HRBEN0001**

You will see the opening screen, <u>Offer Type for Enrollment</u>. Enter information into the field(s) as specified in the table below the screen picturization.

Field Name	Description	R/O/C	User Action/Values
Key Date	Effective date of the benefits	R	If you are enrolling the newly rehired employee in the current date, the button to the left of "Today" is depressed, no input is required. If you are enrolling at a later date, depress the button next to "Other keydate", tab to the input field and enter the effective date as MM/DD/YYYY. **This date must be the date the employee signed the forms.** Enrollment MUST be within 31 days of the rehire date.
Selection	Personnel Number	R	Enter the Employee's personnel number, if known. Use the dropdown arrow to aid in the selection if the Personnel Number is not known.
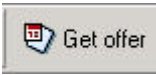
Click the Execute icon .

You now will be shown the "Enrollment Offers" screen.
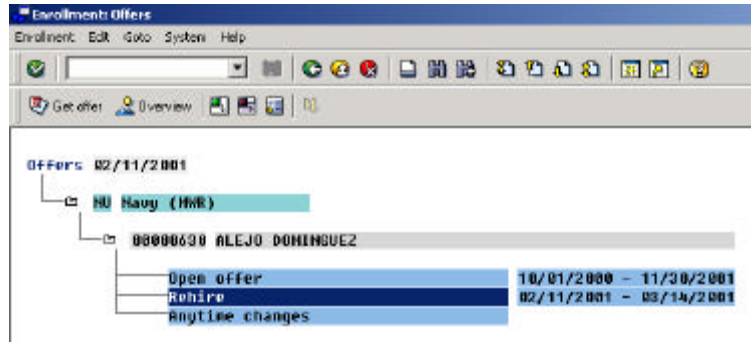
✎ **NOTE**: Employee must have an existing infotype <u>0378 – Adjustment Reasons</u> infotype which will be created during the rehire action.

You may access the next screen using either of these two methods:

- Highlight the **Rehire** line and click on the Get Offer icon on the Application toolbar.

- Highlight the **Rehire** line and double click.

You will now be at the screen labeled **"Enrollment: Plan Selections"**

This screen, partially shown here, lists all the plans in which the employee is eligible to enroll at this time.

Highlight and double click on the indented plan in which you are enrolling the employee.

We have highlighted and double clicked on Aetna Dental to illustrate the process. You will now see a pop-up window named Maintain Health Plan. Enter and check the information as specified in the table below.

Field Name	Description	R/O/C	User Action/Values
Option folder	To select plan and dependent coverage	R	Click on the dropdown arrow by the dependent coverage field to choose the coverage.
Dependent folder	Dependents to be covered	R	Click the Dependent folder to open. Click the button next to the dependent name as shown on the screen below.

Click on the Accept icon on the bottom of the pop-up window and the window will close.

You will return to the 'Enrollment Plan Selection" screen.

- **Highlight** and **double click** on the indented plan in which you are enrolling the employee.

We have highlighted and double clicked on the Aetna Medical Plan.

The screen below shows the first tab of the Maintain Health Plan for the Aetna Medical Plan selection. We have used the dropdown arrow to select Family coverage and the system calculated the bi-weekly cost to the employee as shown on the window.

After checking and verifying the entries on the first tab, we click on the Dependents tab.

We have clicked the Select box next to the name of the spouse to enroll her and then click on the **Accept** icon on the bottom of the pop-up window and the window closes.

We have gone through the process for one more of the eligible plans to illustrate the process. We have chosen the Retirement plan although we haven't shown the input screens.

> **NOTE:** You must verify eligibility for retirement enrollment based on the eligibilty criteria. This enrollment date is based on the information stored in <u>Infotype 0041 – Date Specifications</u> for Retirement Plan Eligibility.

This now finishes all the available selections. You have returned to the **Enrollment Plan Selection** screen. Notice that each time you finished a "Benefit Enrollment" and returned to this screen, a check mark appeared to the left of the completed action.
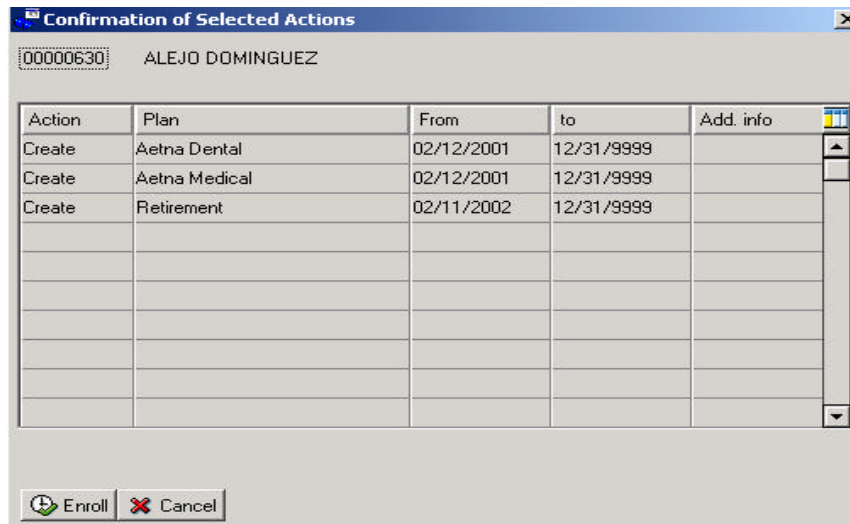
Now that the enrollment actions have been completed, click on the Enroll icon on the Applications toolbar.

- You will now see a screen titled **"Confirmation of Selected Actions".** This screen shows you a list of the benefits and the effective dates for this employee.
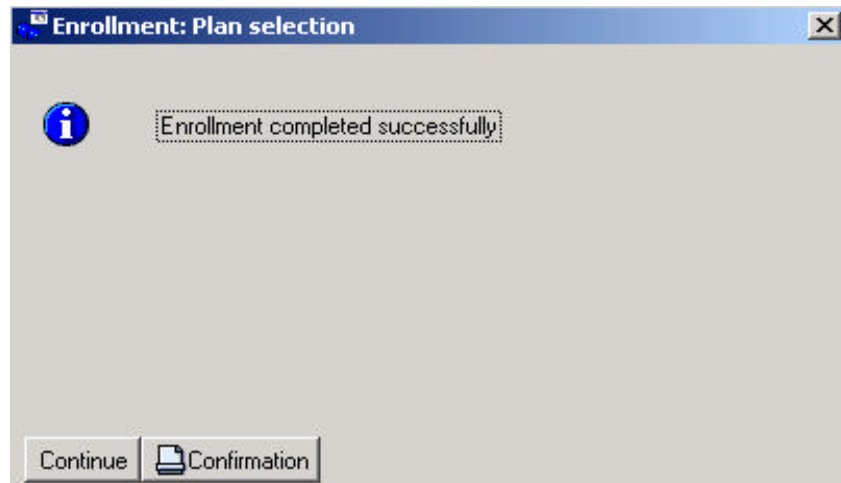
- If the information is correct, click on the **Enroll** icon on the bottom of this pop-up window. You will now see another window verifying that the enrollment was completed successfully as shown below.

- If you are connected to a printer and want a printed confirmation, click on the Confirmation icon on the bottom of the window or if you are finished, click on the Continue icon to return to the **"Enrollment: Offers"** screen.

- You may continue to enroll another employee or if you are finished Benefit Enrollment transactions, click the Exit icon found on the Standard Toolbar to return to the SAP Easy Access screen.

✓ Retiree Benefit Enrollment

This procedure will outline, in detail, the steps required to enroll a **retired** employee into the benefit plans for which they are eligible. This process is **ONLY** for an employee who is in retirement status.

If an employee decides to leave MWR after they are vested into the Retirement system but before they are age-eligible, *and* they leave their money in the system, they can come back for retirement. However, because of the gap in the work history, this type of employee is **NOT** eligible for the free Life Insurance and the Health plans.

Use the following menu path to begin the Retire Benefit Enrollment process.

Menu path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > BENEFITS > ENROLLMENT**

Transaction Code: **HRBEN0001**

Enter information in the field(s) as specified in the table on the next page:

Field Name	Description	R/O/C	User Action/Values/Comments
Key date	Effective date of the benefits	R	If you are enrolling the newly retired employee in the current date, the button to the left of "Today" is depressed, no input is required. If you are enrolling at a later date, depress the button next to "Other keydate", tab to the input field and enter the retirement date as MM/DD/YYYY. **This date must be the date the employee signed the forms.** Enrollment MUST be within 31 days of retirement.
Selection	Personnel Number	R	Enter the retiree's Personnel Number or use the dropdown arrow to aid in the selection.

Click on the Execute icon on the Application toolbar.
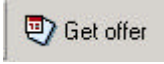
You are now at the screen titled "Enrollment: Offers" as shown below.

> **NOTE:** Retiree must have an existing infotype 0378 record that will be created during the retirement process.
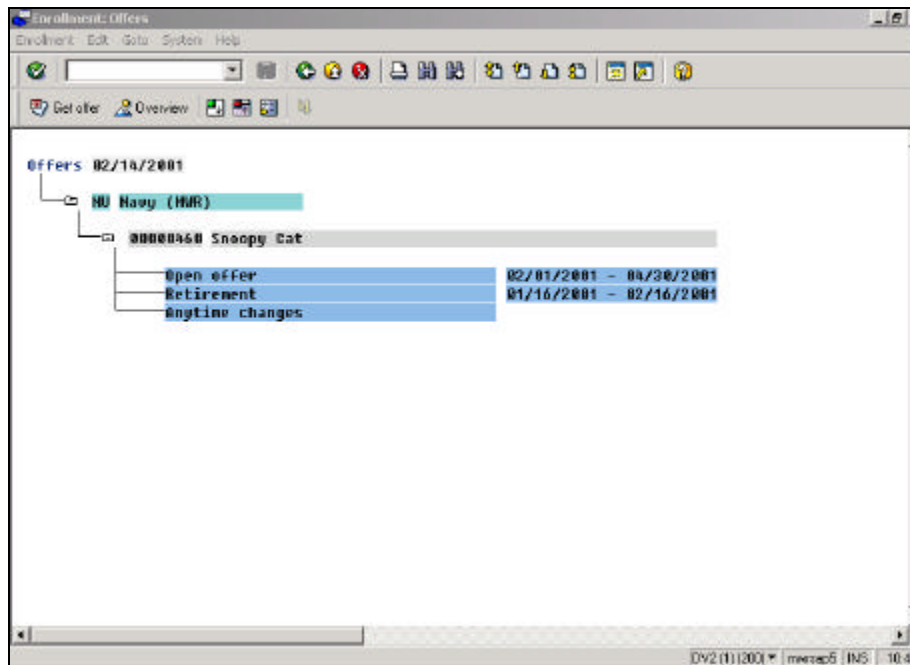
- Highlight **Retirement** and **click** on the Get Offer ⬛ Get offer icon on the Application toolbar.
- Highlight **Retirement** and **double click**.

You will now be at the screen labeled **"Enrollment: Plan Selections"**.
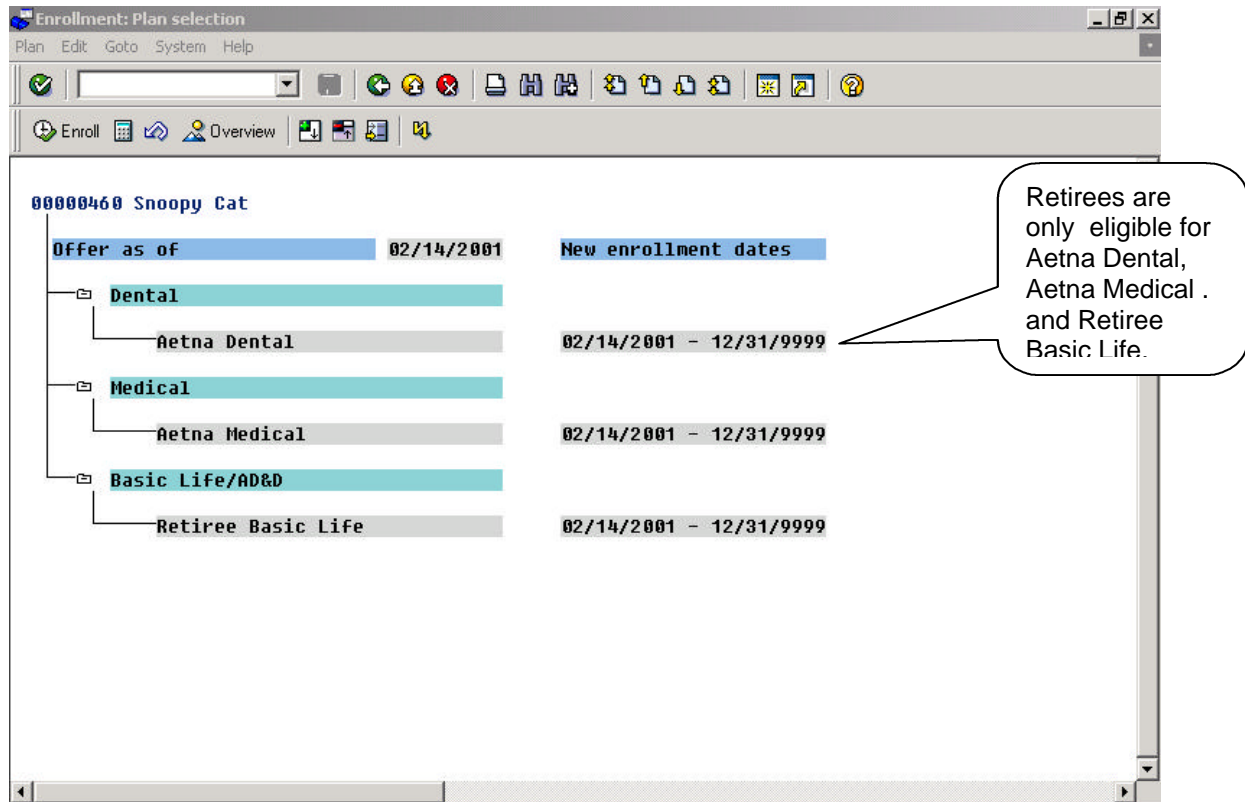
The screen above lists all the plans in which the retired employee is eligible to enroll.

- **Highlight** and **double click** on the indented plan in which you are enrolling the retiree.

In our example, we are **highlighting** and **double clicking** on the **Aetna Dental** line. The popup screen named "Maintain Health Plan" appears.

This is the first of a number of very similar screens that allow verification and acceptance of the Enrollment offers. After verifying the entries, click on the Accept icon ⏀ Accept on the bottom of the pop-up window to return to the selection process.
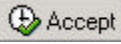
- **Highlight** and **double click** on the next indented plan in which you are enrolling the retiree.

In our example, we are **highlighting** and **double clicking** on the **Aetna Medical** line. The popup screen named "Maintain Health Plan" appears.
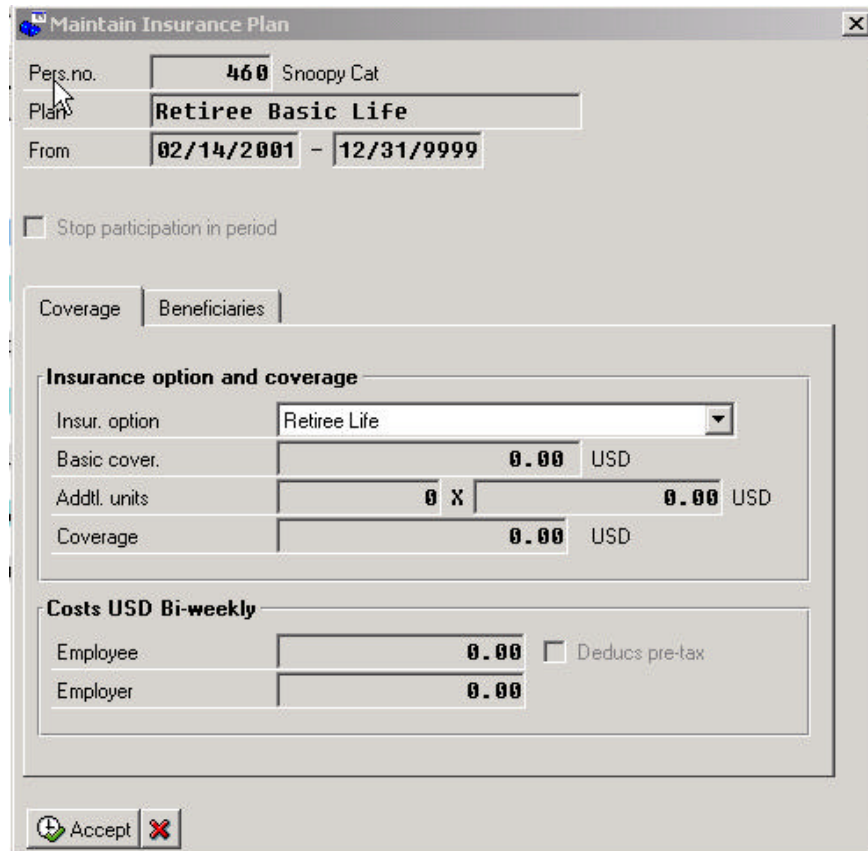
Enter and check the information on the screen above according to the guidelines in the table below:

Field Name	Description	R/O/C	User Actions/Values/Comments
Option folder Option	To select the option of the medical coverage	R	Click on the dropdown arrow and select the appropriate option, if applicable.
Dependent Coverage	To select the appropriate coverage	R	Click on the dropdown arrow and select the type of coverage elected (Family or Employee Only) Employee cost will automatically appear.
Dependent Folder	Dependents to be covered	R	Click on the Dependent folder to open. Click on the small input box to the left of the dependent's name to include them in the coverage. (NOTE: If there are no dependents, this folder tab will not be on the screen).

Click the Accept icon [⊕ Accept] on the bottom of the window and you will return to the **"Enrollment Plan Selection"** screen.

- **Highlight** and **double click** on the next indented plan in which you are enrolling the retiree.

In our example, we are **highlighting** and **double clicking** on the **Retiree Basic Life** line. The popup screen named "Maintain Insurance Plan" appears.
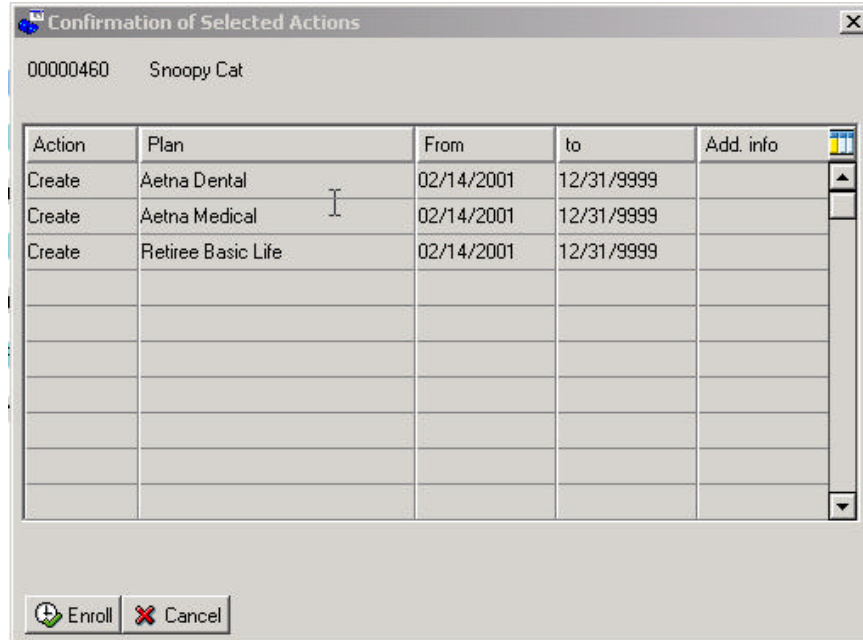
Folder Tab Name	Description	R/O/C	User Action/Values/Comments
Coverage Folder	To select retiree basic life	R	Insurance option field defaults the retiree plan. There is **NO** retiree cost.
Beneficiaries Folder	To select the beneficiaries' options	R	Click on the Beneficiaries folder to open. Enter the % of the benfit to be assigned to each beneficiary. (NOTE: If there are no beneficiaries in the system, this folder tab will not be on the screen).

Click the Accept icon ⟨🕒 Accept⟩ at the bottom of the pop-up window and the window will close. You will be returned to the **"Enrollment Plan Selection"** screen.
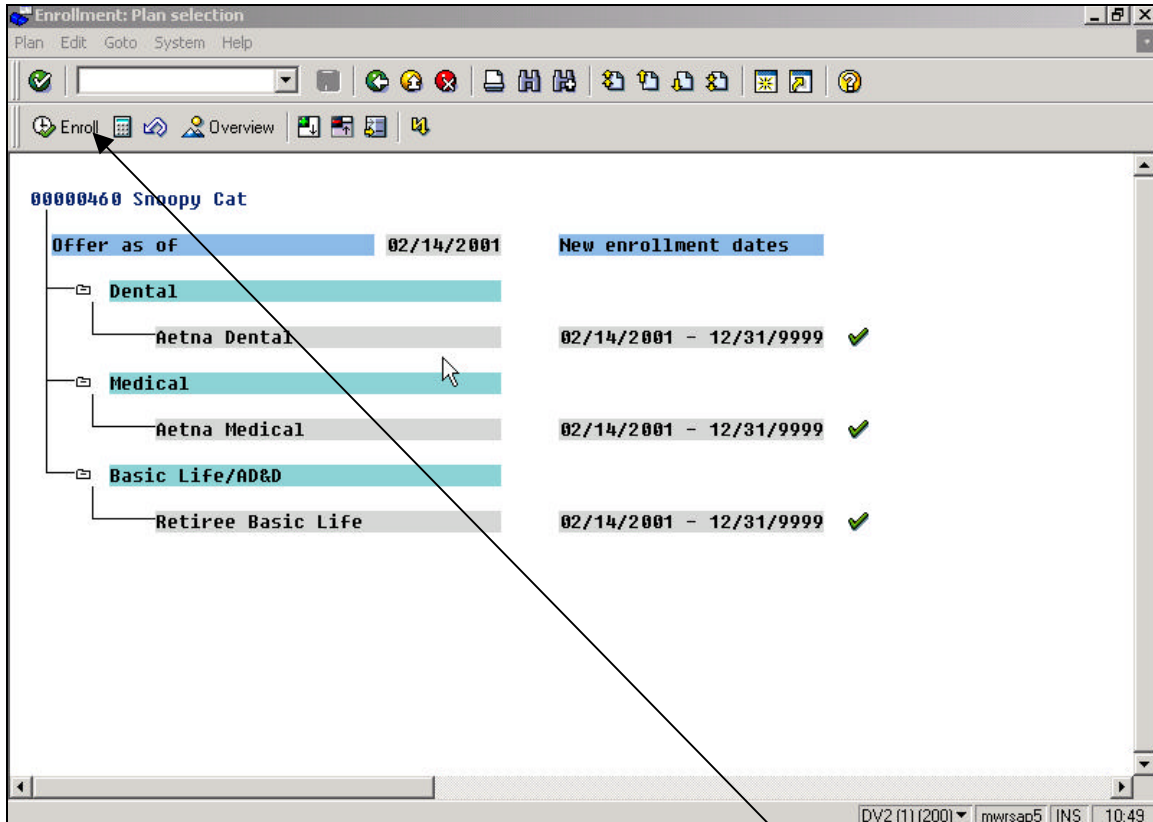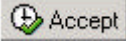

This finishes the available selections. Notice that each time you finished a **"Benefit Enrollment"** and returned to the **"Enrollment: Plan Selection"** screen, a green check mark appeared to the left of each completed action. Now that the enrollment actions have been completed, click on the Enroll icon fould on the applications toolbar.

- You will see a pop-up screen named "Confirmation of Selected Actions". This screen will show the listing of the benefits and the effective dates for this retiree.
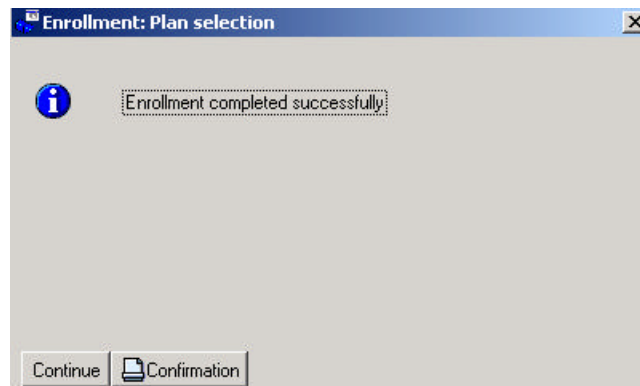
- If the entries are correct, click on the Enroll icon [Enroll] at the bottom of the pop-up window. You will see another pop-up window verifying that the enrollment has been completed sucessfully.

- If you are connected to a printer and want or need a printed confirmation, click the **"Confirmation"** icon at the bottom of the window or if you are finished, click the **"Continue"** icon.

You will return to the "Enrollment: Offers" screen. Click the Exit icon on the "Standard Toolbar" to return to the SAP Easy Access Menu.

┌───┐
│ ✎   **NOTE:** The next step in this process is to maintain the infotype record for "Retiree │
│   Basic Life" and input the details of the plan that needs to be captured.   │
└───┘

You may access this part of the procedure by using the following menu path.

Menu path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT >
ADMINISTRATION > HR MASTER DATA > MAINTAIN**

Transaction code: **PA30**

Field Name	Description	R/O/C	User Action/Values/Comments
Personnel Number	Personnel number of the retired employee	R	Enter the personnel number of the retired employee. If you do not know the number, use the dropdown arrow to aid in the selection by doing a Social Security Number search.
Infotype in the Direct selection section	The number of the infotype to be edited.	R	Enter the infotype number 0168 , clic on Insurance Plan, or click on the dropdown and choose from the menu.
Period	Validity period of the infotype	R	Enter the same date as that used for the enrollment data.

Click on the Change icon on the standard tool bar [pencil icon], this will bring up the "**Change Insurance Plans"** screen for the selected retired employee.

Click on **"Edit"** on the standard menu bar.

Click on Maintain Text or hit F9. This brings up a screen that allows the entry of all plan details in free text as shown below.
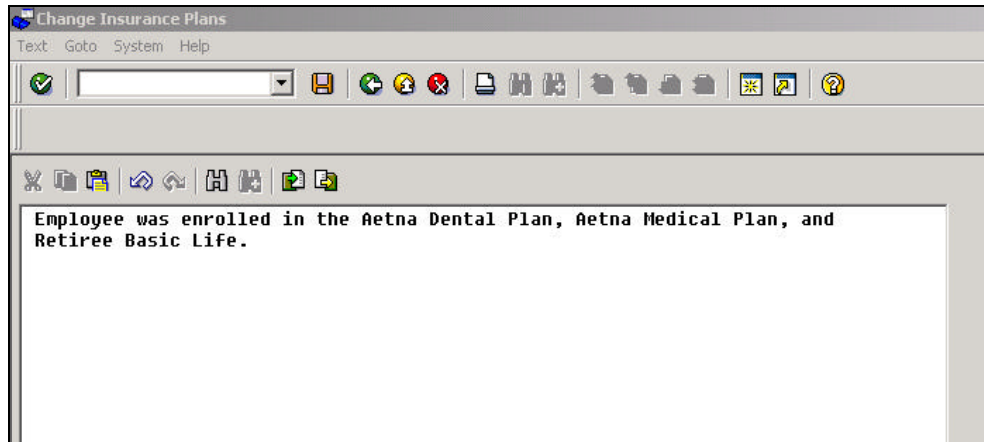
Click on the Save icon , the system will prompt you to Save your changes, click on the Save icon again.

You will be returned to the **"Maintain HR Master Data"** screen.

You will always be able to check on what you have written in the free text box by either clicking on the "Eyeglasses" icon or the "Pencil" icon to inspect the overall infotype – 0168 Insurance Plans record.
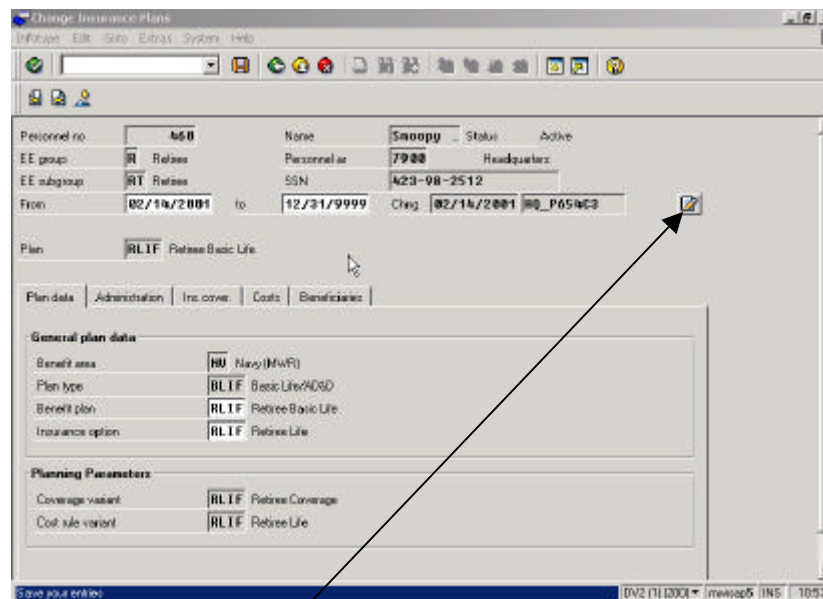
Notice the **Pen and Paper** icon on the right side of the window. By clicking on this icon, you are again shown the free text notes screen.

Click on the Exit icon on the Standard toolbar to return to the SAP Easy Access menu.

✓ Employee Benefits Open Enrollment

This procedure will outline, in detail, the steps required to enroll an existing employee in benefits and/or make changes to existing benefit plans, or a newly hired employee needs to enroll in the benefit plans , all during the "Open Enrollment" period.

This document describes the steps required to make changes to employee benefits and/or enroll new employees in benefits during the open enrollment period.

If the employee is new, then enter all dependents and beneficiaries into infotype 0021 – Family/Related Person in master data before enrolling into the benefit plans.

NOTE: You do NOT have to perform this step if the employee is not new and/or there is no new dependent/beneficiary information.

If an employee is changing plans, you will need to term their existing plan(s) before doing open enrollment for new plans. End Date will be 12-31-??.

An infotype 0378 – Adjustment Reasons does not have to be completed for Open Enrollment.

Use the following menu path or transaction code to start the process:

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > MASTER DATA > MAINTAIN**

Transaction code: **PA30**

While the method is the same as we have done previously in this manual, we will again go through the process of adding an infotype record. In this case, we are adding a dependent/beneficiary to infotype 0021 – <u>Family/Related Person</u>

Directly enter infotype 0021 into the field as we have done in the past and click the

Create icon [ ] .

With this infotype, you will see an interim pop-up window asking for additional information as shown below.

Choose the Family/Related person that we are creating the infotype for. In the example that we are using, we highlight 1 – Spouse and click the green check mark.

Enter the information required in the screen Create Family Related Person as shown above. Use the table below to determine the correct entries.

Field Name	Description	R/O/C	User Actions/Values
From Date	Effective date of the benefit enrollment	R	Enter the effective date and leave the "To Date" as 12/31/9999"
Family type	Relationship	R	This field will be defaulted based on the subtype chosen in the pop-up window menu
Last Name	Last name of the beneficiary or dependent	R	Enter the last name.
First Name	First name of the beneficiary or dependent	R	Enter the first name
Gender	Female or male	R	Click the radio button next to the correct selection
Birth Date	Birth date of dependent. Birth date of beneficiary not required	R	Enter the birth date as required.
SSN	Social Security Number	R	Enter the Social Security Number of the dependent or beneficiary
Street/City/State Zip/Country	Permanent Address	R	Address of the dependent or beneficiary
Physician	Physician of the dependent	R	Enter the Primary Care Physician of the dependent
ID Number	Physician ID number	R	Enter the dependent's Primary Care Physician ID Number.
Status	Student	C	Required if dependent is over 19 years of age
Challenge	Whether the dependent is disabled/ handicapped.	C	Check if the dependent is disabled/ handicapped.

Once the screen is completed, Click the enter check mark to validate the entries and the click the Save icon to save the transaction.

	NOTE: A time saving tip would be to create all the dependents and/or beneficiaries for the employees you are planning to enroll into benefits before starting the benefit enrollment process.

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > BENEFITS > ENROLLMENT**

Transaction Code: **HRBEN0001**

Enter the information for this screen based on the table below.

Field Name	Description	R/O/C	User Action/Values
Key Date	Effective date of benefits	R	Enrolling of an open enrollment is the first of year for enrollment period.
Selection	Personnel Number	R	Enter the employee's personnel number and click the Execute icon [icon] on the application toolbar

You are now at a screen labeled "Enrollment Offers" as shown on the next page.
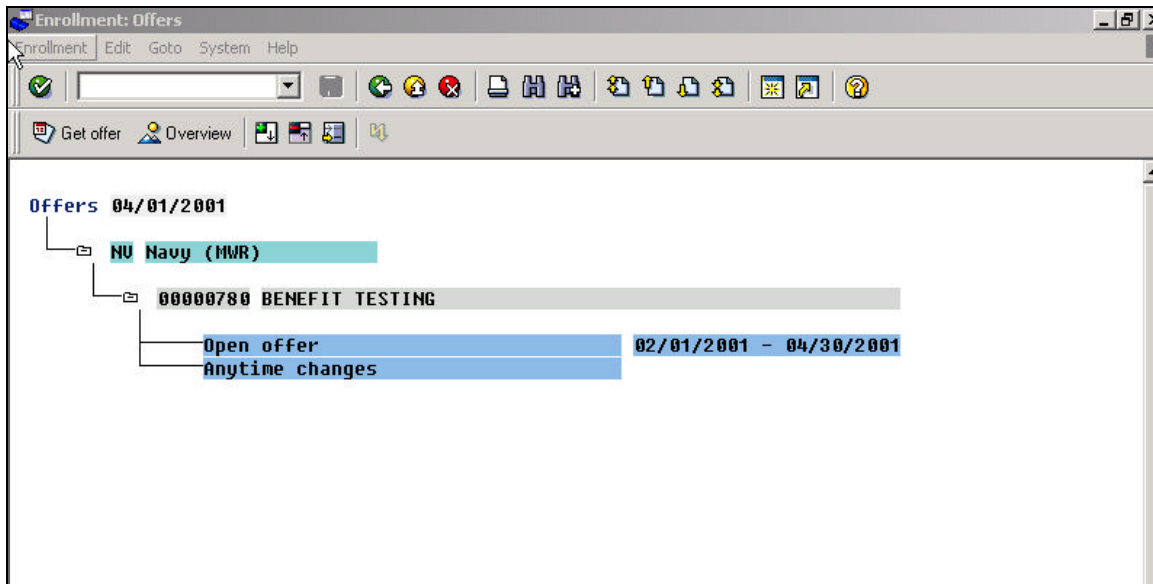
Highlight the line reading **"Open Offer"** and click on the pushbutton labeled Get Offer
[Get offer] **OR** highlight the line reading **"New Hire Enrollment" or "Open Offer"** and double click.
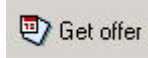
The next screen will list all the plans that the employee is eligible for. This is the point where we can start the enrollment process.
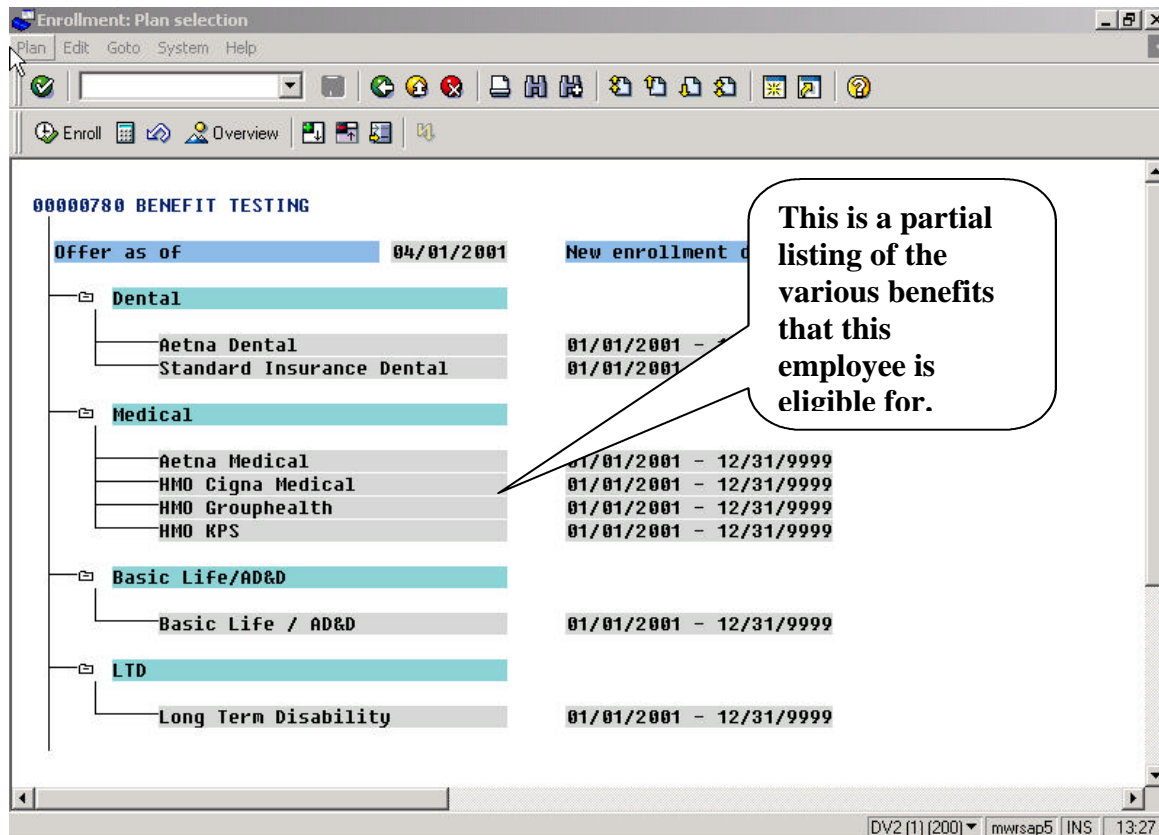
The procedure for enrolling employees into any of the eligible plans is essentially the same. The first step is to **highlight** the intended plan and **double click** on the line.

The first screen, which is typical of all of the benefit enrollment windows, is the Maintain Health Plan.

Field Name	Description	R/O/C	User Action/Values
Option folder tab	To select plan option and dependent coverage	R	Option field will default with the dental plan. Click on the dropdown arrow on the field labeled **Dependent cov.** and click on the coverage the employee has selected. The employee cost will automatically appear
Dependent folder tab	Dependents to be covered	R	Click on the Dependent folder tab to open. Click on the button to the left of each dependent's name. If there are no dependents, this tab will not appear.

Click the accept icon ⊕ Accept at the bottom of the pop-up enrollment window, the window closes and you will then return to the **Enrollment Plan Selection** screen.

Highlight and **double click** on the next indented plan in which you are enrolling the employee. We are showing the selection of Basic Life Insurance.

We enter and check the information as specified in the table below:

Field Name	Description	R/O/C	User Action/Values
Coverage folder tab	To select Basic Life/AD&D coverage	R	Insurance option defaults this plan. Input 2000 into the "**Addtl units**" field. **This field is configured to accept nothing else**. You will note that the Employee cost will automatically appear.
Beneficiaries folder tab	Input field	R	Click on the "Beneficiary Folder" and enter the percentage % of the benefit to be assigned each dependent.

Click the accept icon [Accept] on the bottom of the pop-up window, the window will close and you will be returned to the "Enrollment Plan Selection" screen.

Continue to highlight and double click on each of the indented plans in which you are enrolling an employee and proceed with each benefit enrollment following the same procedures as described above.

For example, for **Long Term Disability Insurance**:

Click on the dropdown arrow on the **Ins. Option** line. Select either Long Term Disability or LTD Paid up.

Note: If choosing the Long-Term Disability option, the employee cost will appear.

Click the accept icon [Accept] on the bottom of the pop-up window, the window will close and you will be returned to the "Enrollment Plan Selection" screen.

The next example of the procedures is illustrated using the **Optional Life Insurance** enrollment.

Double click on the **Optional Life** line.

Click the dropdown arrow next to **Insur. Option**. Choose either Optional Life 1X Salary or Optional Life 2X salary.

Click the accept icon ⊕ Accept on the bottom of the pop-up window, the window will close and you will be returned to the "Enrollment Plan Selection" screen.

The next example of the procedures is illustrated using the **401K Savings Plan** enrollment.

The inputs for this **Maintain Savings Plan** screen are as follows. The table below explains the inputs for all three of the folder tabs.

Tab Names	Description	R/O/C	User Action/Values/Comments
Contributions Regular	Pre-tax, bi-weekly contribution	R	Percentage. Enter a percentage amount between 1 – 15%. The system will generate an error if the percentage is over 15%.
Investments	Input field	R	Click on the **Investments** tab. Enter the percentage of investments applicable to each plan. Percentages must total 100%
Beneficiaries	Input field	R	Click on the **Beneficiaries** tab. Enter the % of the benefit to be distributed to each beneficiary. If the beneficiary is someone other than a spouse, the date must also be entered in the Spousal Consent field.

Click the Accept icon 🕑 Accept on the bottom of the pop-up window, the window will close and you will be returned to the "Enrollment Plan Selection" screen.

Notice that each time you finished a "**Benefit Enrollment**" and returned to the "**Enrollment Plan Selection**" screen, a "check mark" appears to the right of each completed action.

When all the enrollment actions have been complete, click on the Enroll icon on the applications toolbar.

You will now see a pop-up screen labeled **Confirmation of Selected Actions**. This window will show you a list of all the enrolled benefits and their effective dates.

If all the information is correct, click on the Enroll pushbutton on the bottom of the pop-up window.

You will see another popup window verifying that the enrollment has been completed successfully.

At this point, if you are connected to a printer and the employee wants a printed confirmation of all the enrollments, click the Confirmation icon at the bottom of the window or if you are finished, click on the "Continue" button.

You are returned to the **Enrollment: Offers** screen. You may continue to enroll another employee or if you are finished with the benefit enrollment transaction.
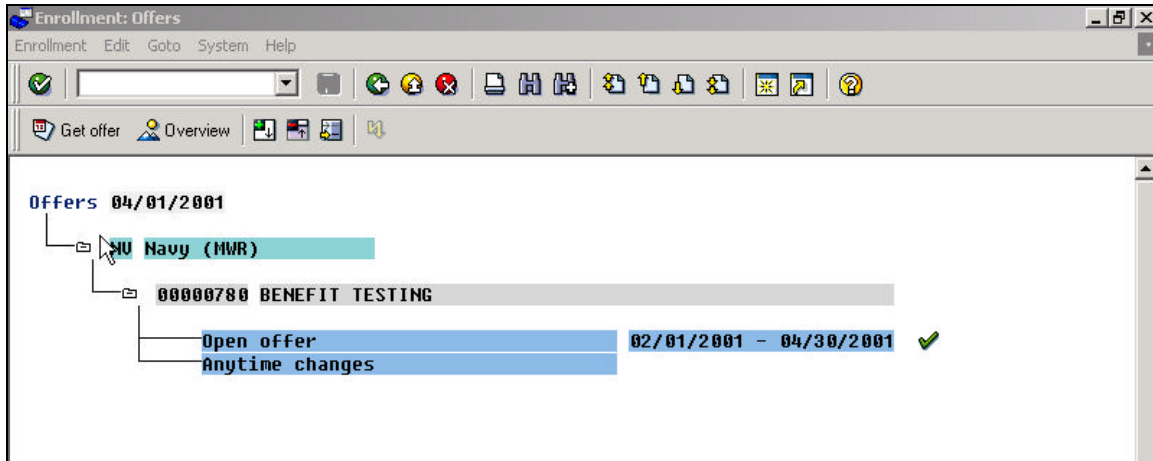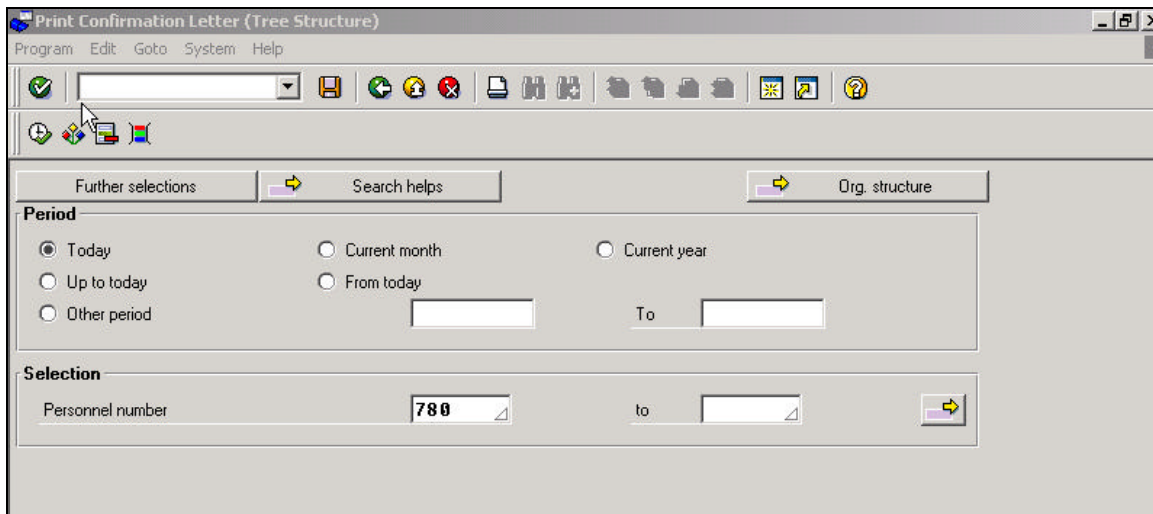
Click the Exit icon on the Standard toolbar to return to the SAP Easy Access Screen.

To Print the Forms:

HUMAN RESOURCES>PERSONNEL MANAGEMENT>BENEFITS>FORMS
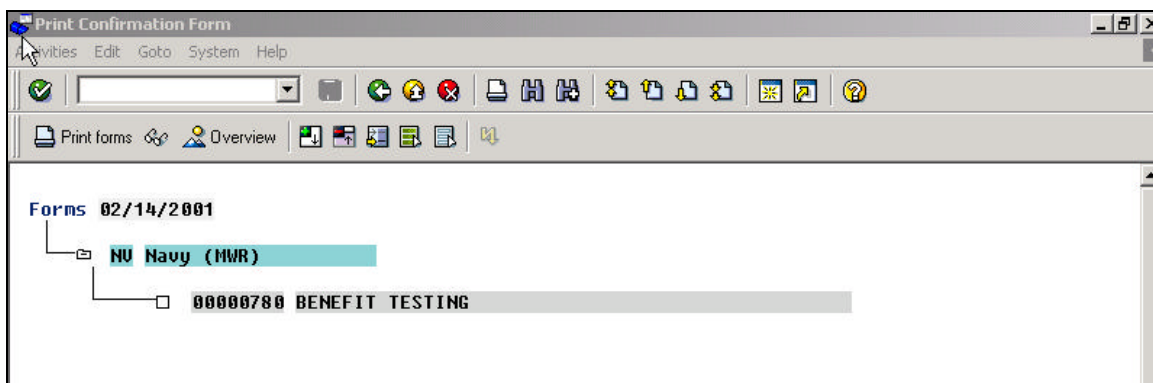
Choose either:

- Enrollment
- Confirmation

Enter the date and personnel number.

Click the Execute icon.

Click the Print Forms icon.

> ✏️ **NOTE:** The SAP Easy Access Screen shows the report name. The screen can be customized to show transaction codes as well using the "Extras > settings > show technical name" menu path in the standard toolbar.

✅ **Benefits Eligibility Report**

HUMAN RESOURCES > INFO SYSTEM > REPORTS > PERSONNEL MGMT > BENEFITS > PARTICIPATION > Eligible Employees

Transaction code **HERBEN0071**
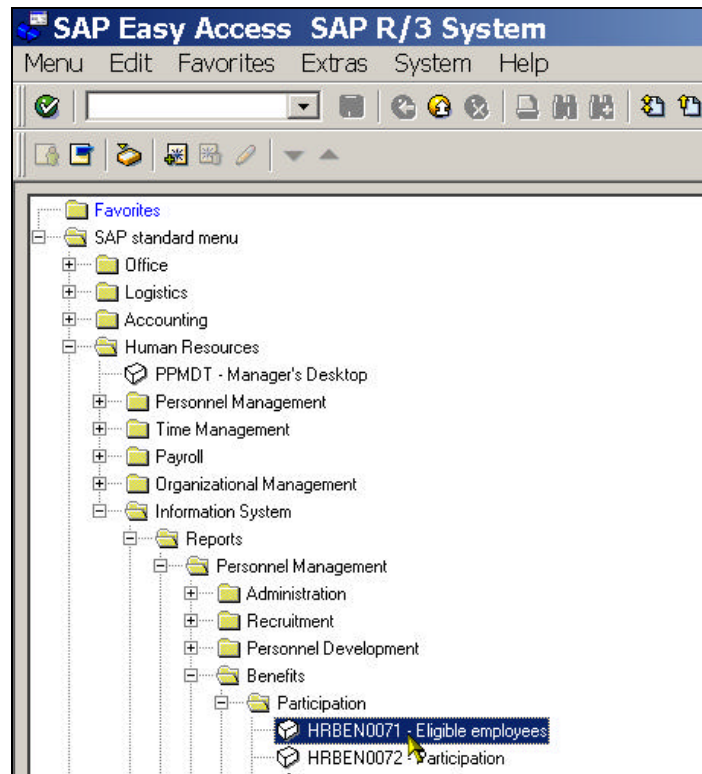
If using the menu path, double click "**HRBEN0071 – Eligible employees"** to go to the next screen.

Screen: Eligible Employees

Field Name	Description	R/O/C	User Action, Values, Comments
Key Date	Date for which report is to be generated	R	If report is for the present day, leave "Today" checked, or if the report is for a different day, then select "Other keydate" and put in the desired date.
Personnel Number	Personnel number range	O	Enter the desired personnel number, range or leave blank for all personnel
Benefit Area	Benefit Area	R	Enter NV or select NV using the dropdown arrow
1st Program Grouping	Region	O	Enter the desired 1st program grouping or select using dropdown arrow. **When selecting more than one program grouping or benefit plan, use multiple selection option**
2nd Program Grouping	Classification	O	Enter the desired 2nd program grouping or select using the dropdown arrow. **When selecting more than one program grouping or benefit plan, use multiple selection option**
Benefit Plan	Benefit plans available	O	Enter the identifier if known or select using the dropdown arrow. **When selecting more than one program grouping or benefit plan, use multiple selection option**

Select 🕘 icon to generate report.

Eligible Employees

Report first appears sorted by benefit plan. To sort by employee, highlight the column with employee names by clicking once at the top (see illustration). Then select the *Sort Descending* 🖳 icon.You can now see all the plans each each employee is eligible for next to the employee name.

Eligible Employees

Click this icon to put data into an Excel spreadsheet.

Change the variants (column descriptions) by selecting the [icon] icon. You will see the following screen:

Define Display Variants

The column on the left lists the description and position of the variants that are already displayed in the report. The column on the right lists variants that are hidden. "Unhide" them by selecting one or more variants, then click the arrow pointing left (as shown). For example, to display date of birth, select it by clicking on it. Clicking the left pointing arrow moves the selected variant from the column on the right to the column on the left.

Select the ✔ Copy icon to save the changes and view the report with the now "unhidden" variant or variants
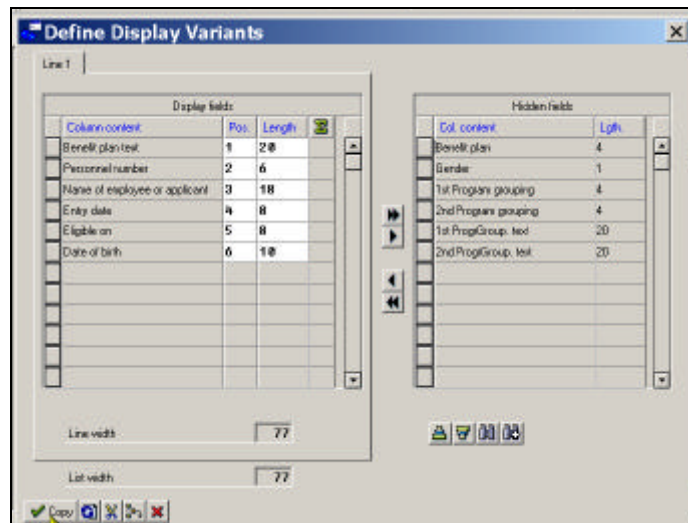
The sample report shows that the "birth date" for each employee is now visible.

Eligible Employees

Click this icon to put data into an Excel spreadsheet.

Select the 🏠 icon to exit the report or ⬅ to go back

☑ Employee Benefits Participation

This document describes the procedure required to generate a report showing employees participating in select or all Benefit plans.

HUMAN RESOURCES > INFORMATION SYSTEM > REPORTS > PERSONNEL MANAGEMENT > BENEFITS > PARTICIPATION > HRBEN0072 – PARTICIPATION

Transaction code **HRBEN0072**
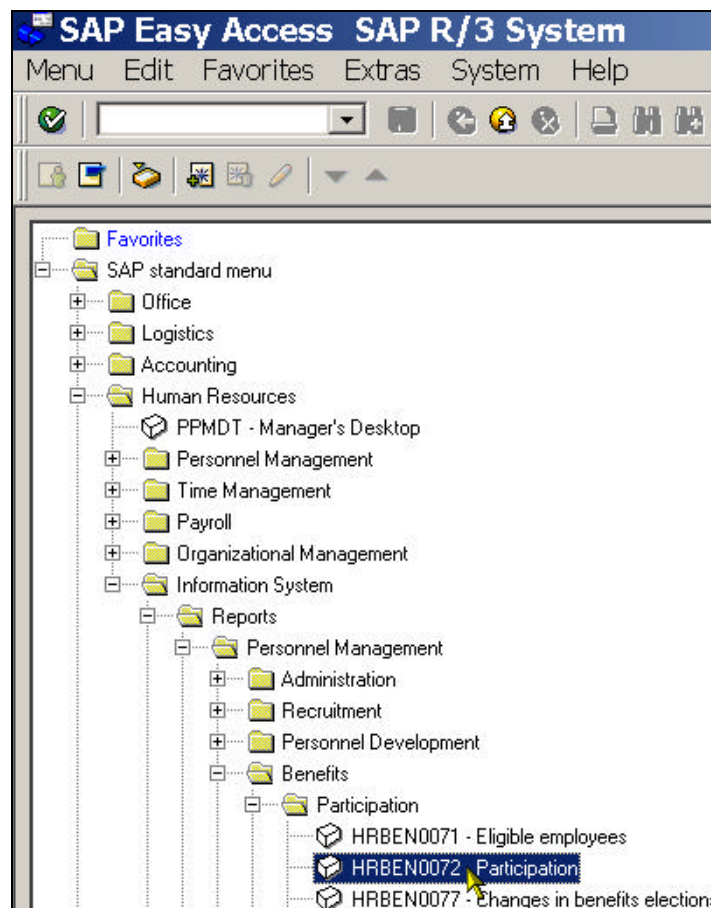
If using the menu path, double click "**HRBEN0072 – Participation**" to go to the next screen.

Participation

Enter information in the fields as specified in the table below. **Note:** In column
"**R/O/C,**" **R** = Required, **O** = Optional, **C** = Conditional.

Field Name	Description	R/O/C	User Action, Values, Comments
Period	Period for which report is to be generated	R	Choose the desired period or enter a beginning and end date if you select the other period.
Personnel Number	Personnel number range you want to report on	O	Enter the desired personnel number, range or leave blank for all personnel
Benefit Area	Benefit Area to be reported on	R	Enter NV or select using the dropdown arrow
1st Program Grouping	1st Program Grouping to be reported on	O	Enter the desired 1st program grouping or select using the dropdown arrow **When selecting more than one program grouping or benefit plan, use multiple selection option**
2nd Program Grouping	2nd Program Grouping to be reported on	O	Enter the desired 2nd program grouping or select using the dropdown arrow **When selecting more than one program grouping or benefit plan, use multiple selection option**
Benefit Plan	Character Identifier for the Benefit Plan	O	Enter the identifier if known or using the dropdown arrow **When selecting more than one program grouping or benefit plan, use multiple selection option**

Select ![icon] icon to generate report.

Participation

Click this icon to put the data into an Excel spreadsheet.

The report is generated on the screen and can be printed. If finished, select the ![icon] icon to exit the report.

✅ Changes in Benefits Elections

This document describes the procedure required to generate a report showing which employees have had changes made to their Benefit plans.

HUMAN RESOURCES > INFORMATION SYSTEM > REPORTS > PERSONNEL MANAGEMENT > BENEFITS > PARTICIPATION > HRBEN0077 – CHANGES IN BENEFITS ELECTIONS

Transaction code **HRBEN0077**
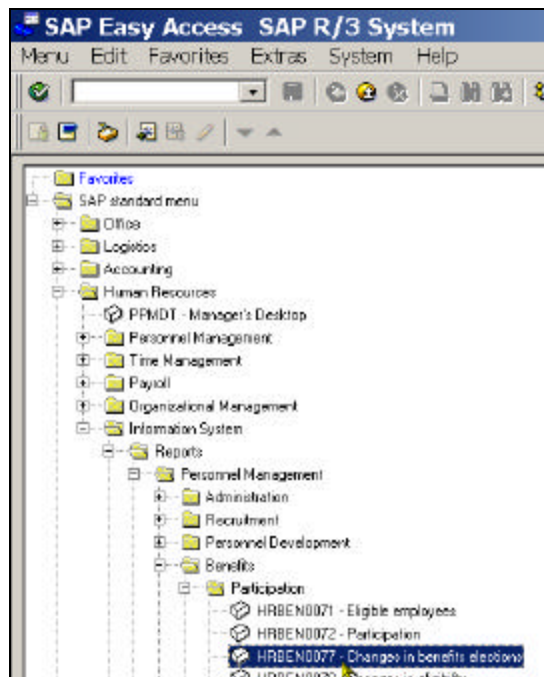
If using the menu path, double click "**HRBEN0077 – Changes in Benefits Elections**" to go to the next screen.

Changes in Benefits Elections

Enter information in the fields as specified in the table below. **Note:** In column "**R/O/C,**" **R** = Required, **O** = Optional, **C** = Conditional.

Field Name	Description	R/O/C	User Action, Values, Comments
Period	Period for which report is to be generated	**R**	Choose the desired period or enter a beginning and end date if you select the other period.
Personnel Number	Personnel number range you want to report on	**O**	Enter the desired personnel number, range or leave blank for all personnel
Provider	Benefit Provider	**O**	Enter Provider name or select using dropdown arrow. This dropdown will contain all providers that have records for accounts payable. Scroll down to find provider.
Plan	Benefit plan you want to report on.	**O**	Enter the desired plan code or select using dropdown arrow.

Select [icon] icon to generate report.

Changes in Benefits Elections

The report is generated on screen and can be printed. Only part of the report is visible in the above illustration. On your screen, scroll down to view. If there have been no changes in benefits for the criteria specified on the initial screen, SAP will inform you that there is "No data available for your entries."

Select the icon to exit this report.

☑ Employee Changes in Eligibility

This document describes the procedure required to generate a report showing which employees have had changes in their Benefits eligibility.

HUMAN RESOURCES > INFORMATION SYSTEM > REPORTS > PERSONNEL MANAGEMENT > BENEFITS > PARTICIPATION > HRBEN0079 – Changes in eligibility

Transaction code **HRBEN0079**
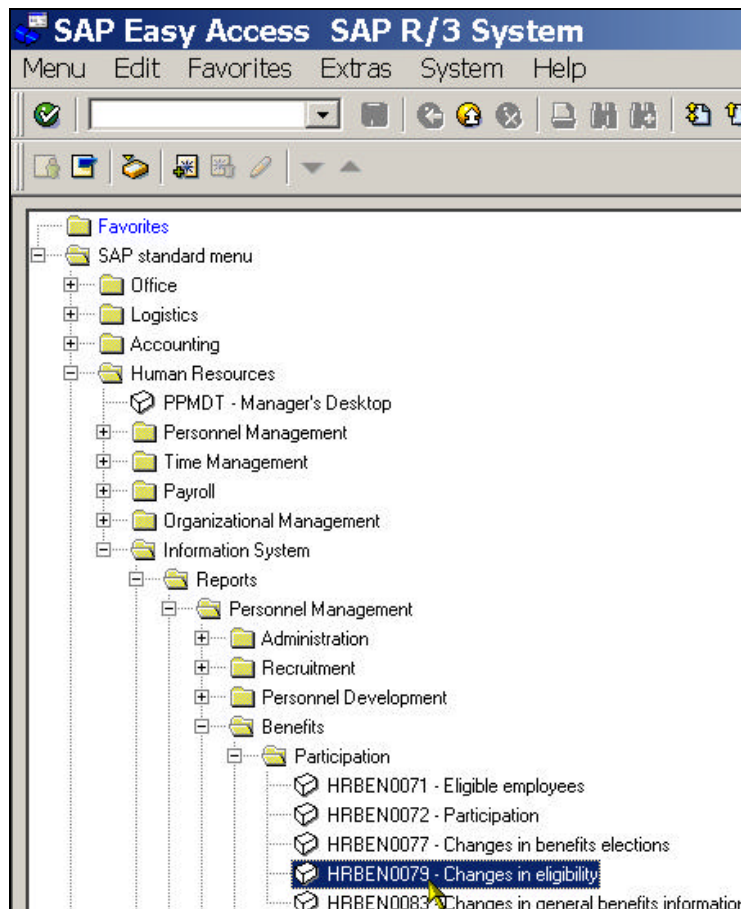
If using the menu path, double click "**HRBEN0079 – Changes in eligibility**" to go to the next screen.

Changes in Eligibility

Enter information in the fields as specified in the table below. **Note:** In column "**R/O/C,**" **R** = Required, **O** = Optional, **C** = Conditional.

Field Name	Description	R/O/C	User Action, Values, Comments
Period	Period for which report is to be generated	R	Choose the desired period or enter a beginning and end date if you select the other period.
Personnel Number	Personnel number range you want to report on	O	Enter the desired personnel number, range or leave blank for all personnel
Plan	Character Identifier for the Benefit Plan	O	Enter the identifier if known or using the dropdown arrow **When selecting more than one program grouping or benefit plan, use multiple selection option**

Select ⏱ icon to generate report.

Changes in eligibility

The report is generated on the screen and can be printed. If finished, select the icon to exit the report.

☑ Employee Changes in General Benefits Information

This document describes the procedure required to generate a report showing which employees have had General Benefits information changed.

HUMAN RESOURCES > INFORMATION SYSTEM > REPORTS > PERSONNEL MANAGEMENT > BENEFITS > PARTICIPATION > HRBEN0083 – Changes in general benefits information

Transaction code **HRBEN0083**
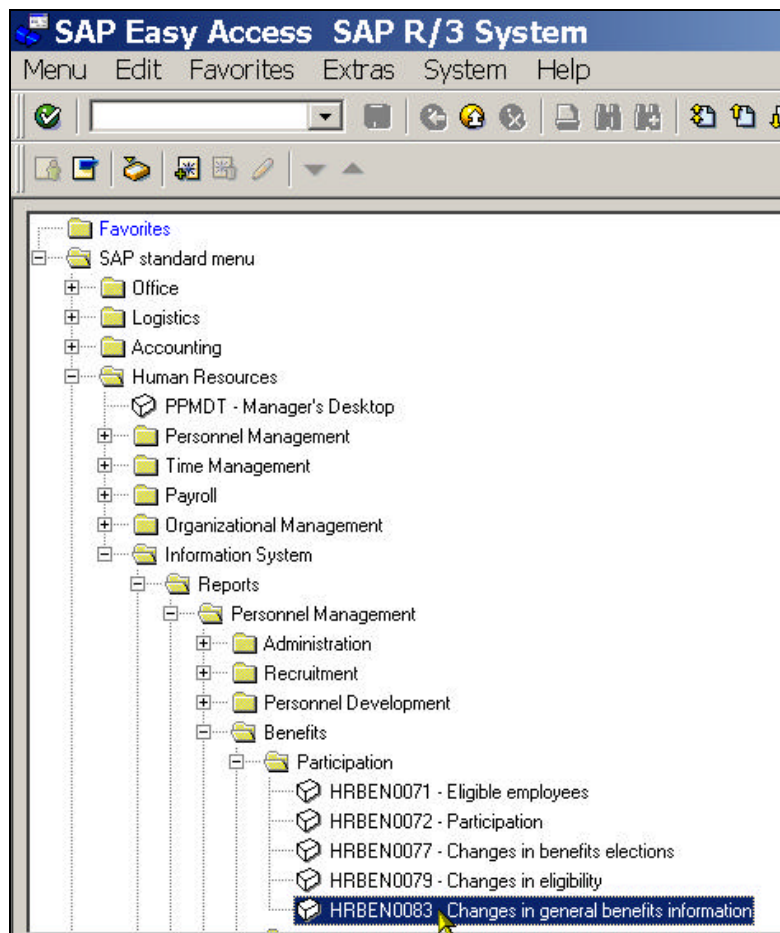
If using the menu path, double click "**HRBEN0083 – Changes in personal benefits information**" to go to the next screen.

Changes in Default Values for General Benefits Information

Field Name	Description	R/O/C	User Action, Values, Comments
Period	Period for which report is to be generated	R	Choose the desired period or a beginning and end date if you select the other period.
Personnel Number	Personnel number range you want to report on	O	Enter the desired personnel number, range or leave blank for all personnel
Benefit Area	Benefit Area to be reported on	R	Enter NV or select using dropdown arrow
1st Program Grouping	1st Program Grouping to be reported on	O	Enter the desired 1st program grouping or select using dropdown arrow
2nd Program Grouping	2nd Program Grouping to be reported on	O	Enter the desired 2nd program grouping or select using dropdown arrow
Reason for Deviation from Default values	This is the reason for the change/s in Employee default values	R	Select Manual Override or Changes in Default Values.

Select ⏱ to generate the report:

Changes in Default Values for General Benefits Information

The report is generated on the screen and can be printed. If finished, select the 🏠 icon to exit the report.

☑ Employee Health Plan Cost

This document describes the procedure required to generate a report showing the cost of select health plans or all health plans.

HUMAN RESOURCES > INFORMATION SYSTEM > REPORTS > PERSONNEL MANAGEMENT > BENEFITS > COST AND CONTRIBUTIONS > HRBEN0073 – Health plan costs

Transaction code **HRBEN0073**
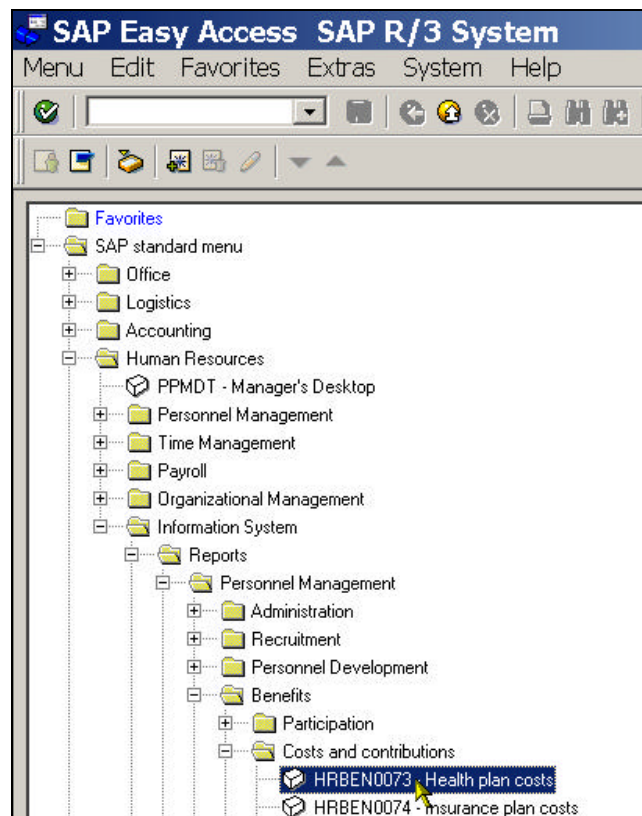
If using the menu path, double click "**HRBEN0073 – Health plan costs**" to go to the next screen.

Health Plan Costs

Field Name	Description	R/O/C	User Action, Values, Comments
Key date	Date for which report is to be generated	R	Present date is checked, if you need to run report for a different date, select "Other keydate" and put in the desired date.
Personnel Number	Personnel number or range you want to report on	O	Enter the desired personnel number, range or leave blank.
Benefit Area	Benefit Area to be reported on	R	Enter NV or select using dropdown arrow
1st Program Grouping	1st Program Grouping to be reported on	O	Enter the desired 1st program grouping or select using dropdown arrow
2nd Program Grouping	2nd Program Grouping to be reported on	O	Enter the desired 2nd program grouping or select using dropdown arrow
Benefit Plan	Benefit plans for which report is to be generated	O	Enter the Benefit plan code or select using dropdown arrow, **OR** leave blank for all health plans

Select [icon] to generate the report:

Health Plan Costs

The report is generated on the screen and can be printed. Use the scroll bars to the right and bottom of the screen to view the entire report not visible here.

If finished, select the icon to exit the report.

☑ Employee Insurance Plan Cost

This document describes the procedure required to generate a report showing the cost of select insurance plans or all insurance plans.

HUMAN RESOURCES > INFORMATION SYSTEM > REPORTS > PERSONNEL MANAGEMENT > BENEFITS > COST AND CONTRIBUTIONS > HRBEN0074 – Insurance Plan Costs

Transaction code **HRBEN0074**
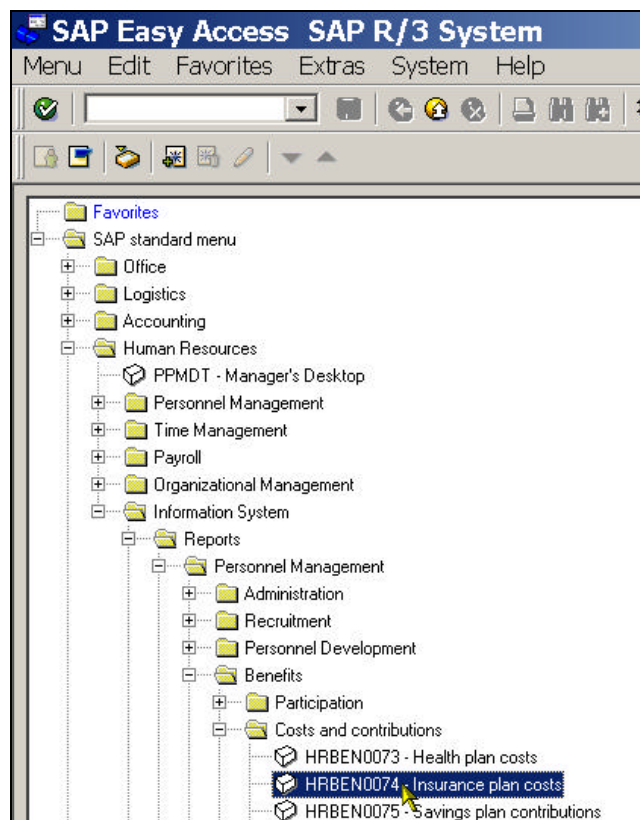
If using the menu path, double click "**HRBEN0074 – Insurance plan costs**" to go to the next screen.

Insurance Plan Costs

Field Name	Description	R/O/C	User Action, Values, Comments
Key date	Date for which report is to be generated	R	Present date is checked, if you need to run report for a different date, select "Other keydate" and put in the desired date.
Personnel Number	Personnel number or range you want to report on	O	Enter the desired personnel number, range or leave blank for all personnel
Benefit Area	Benefit Area to be reported on	R	Enter NV or select using dropdown arrow
1st Program Grouping	1st Program Grouping to be reported on	O	Enter the desired 1st program grouping or select using dropdown arrow
2nd Program Grouping	2nd Program Grouping to be reported on	O	Enter the desired 2nd program grouping or select using dropdown arrow
Benefit Plan	Benefit plans for which report is to be generated	O	Enter the Benefit plan code or select using dropdown arrow, **OR** leave blank for all health plans

Select to generate the report:

Insurance Plan Costs

The report is generated on the screen and can be printed. If finished, select the icon to exit the report.

☑ Employee Demographics

This document describes the procedure required to generate a report showing the Employee Demographics in regard to Benefit plans.

HUMAN RESOURCES > INFORMATION SYSTEM > REPORTS > PERSONNEL MANAGEMENT > BENEFITS > STATISTICS > HRBEN0081 - Employee demographics

Transaction code **HRBEN0081**
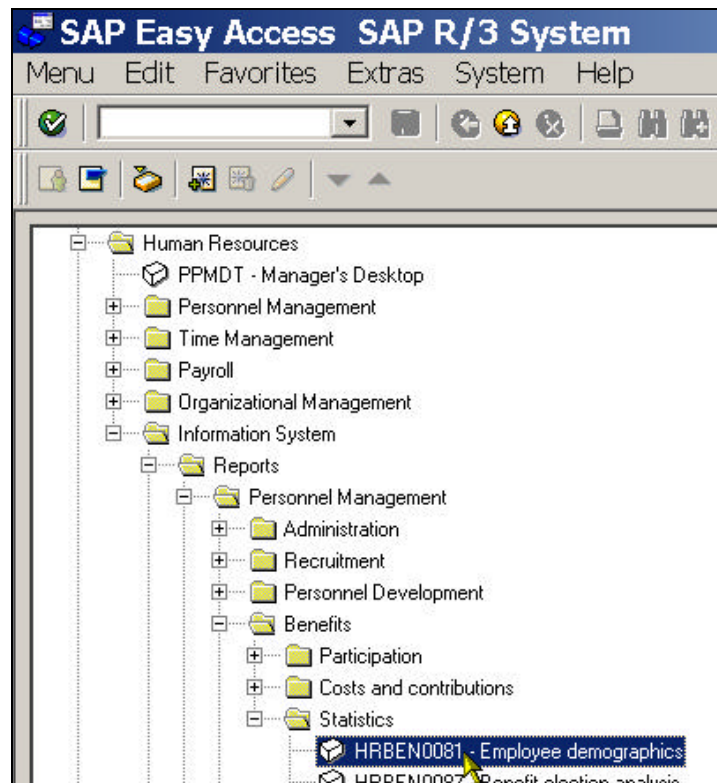
If using the menu path, double click "**HRBEN0081 – Employee demographics**" to go to the next screen.

Employee Demographics

Field Name	Description	R/O/C	User Action, Values, Comments
Period	Period for which report is to be generated	R	Choose the desired period or enter a beginning and end date if you select the other period.
Personnel Number	Personnel number range you want to report on	O	Enter the desired personnel number, range or leave blank.
Evaluation Date	Date of Evaluation	O	This allows for selection of specific date if a range had earlier been selected.
Age Groups	Age group to be reported on	O	Enter the identifier if known or using the dropdown arrow **When selecting more than one program grouping or benefit plan, use multiple selection option**

Select to generate the report:

Employee Demographics

The report is generated on the screen and can be printed. If finished, select the ⬆ icon to exit the report.

☑ Employee Benefits Elections

This document describes the procedure required to generate a report showing the Employee Benefits Elections.

HUMAN RESOURCES > INFORMATION SYSTEM > REPORTS > PERSONNEL MANAGEMENT > BENEFITS > STATISTICS > HRBEN0087 - Benefits Election Analysis

Transaction code **HRBEN0087**
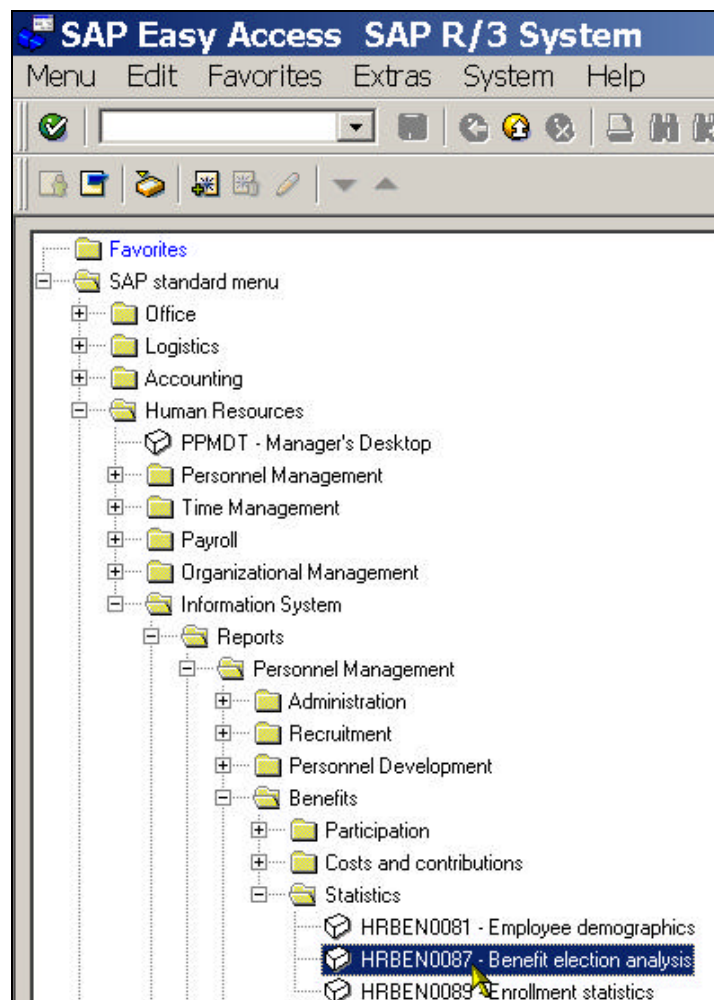
If using the menu path, double click "**HRBEN0087 – Benefit election analysis**" to go to the next screen.

Benefit Election Analysis

| Field Name	Description	R/O/C	User Action, Values, Comments
Personnel Number	Personnel number range you want to report on	O	Enter the desired personnel number, range or leave blank for all personnel
Benefit Area	Benefit Area to be reported on	R	Enter NV or select using dropdown arrow
1st Program Grouping	1st Program Grouping to be reported on	O	Enter the desired 1st program grouping or select using dropdown arrow
2nd Program Grouping	2nd Program Grouping to be reported on	O	Enter the desired 2nd program grouping or select using dropdown arrow
Plan Type	Benefit Plan type to be reported on	O	Enter the desired Plan type or select using dropdown arrow
Benefit Plan	Benefit plans for which report is to be generated	O	Enter the Benefit plan code or select using dropdown arrow, **OR** leave blank for all health plans
Starting Point on	Start date of Analysis	O	Put in a beginning date to limit the range of report to be generated
Changed on	End date of Analysis	O	Put in an end date to limit the range of report to be generated

Select ⌧ to generate the report:

Benefit Election Analysis

The report is generated on the screen and can be printed. If finished, select the 🔼 icon to exit the report.

☑ Benefits Enrollment Statistics

This document describes the procedure required to generate a report showing the Benefits Enrollment Statistics.

HUMAN RESOURCES > INFORMATION SYSTEM > REPORTS > PERSONNEL MANAGEMENT > BENEFITS > STATISTICS > HRBEN0089 - Enrollment statistics

Transaction code **HRBEN0089**
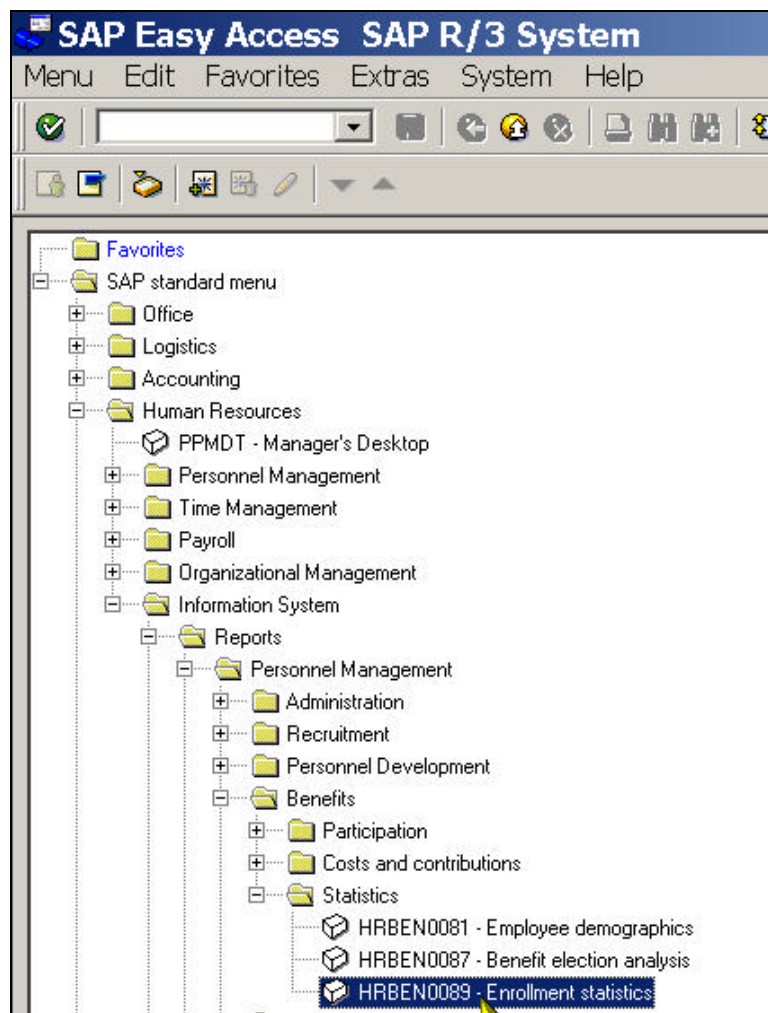
If using the menu path, double click "**HRBEN0089 – Enrollment statistics**" to go to the next screen.

Enrollment Statistics
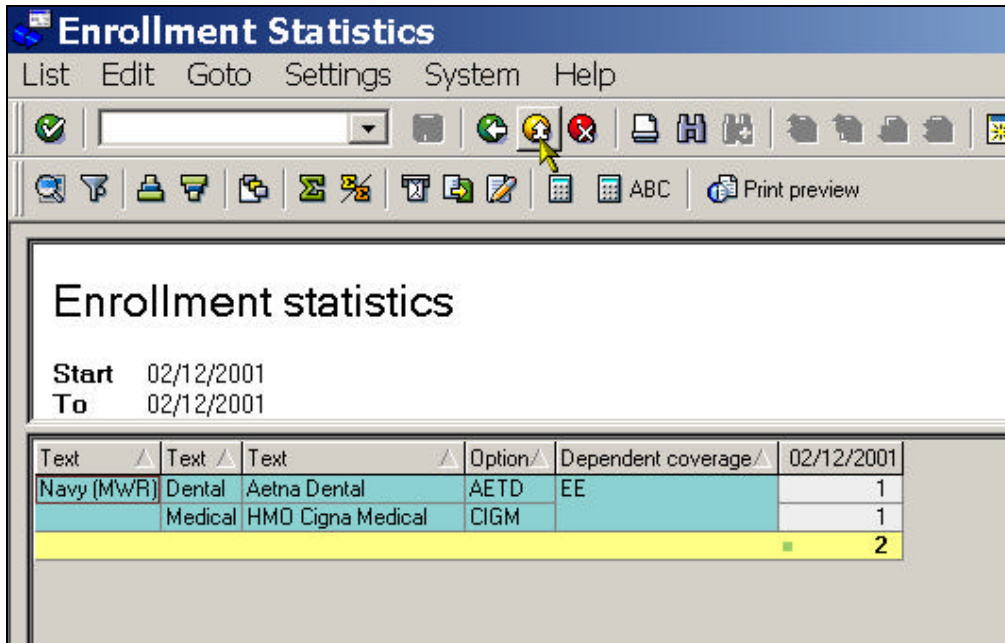
Field Name	Description	R/O/C	User Action, Values, Comments
Personnel Number	Personnel number range you want to report on	O	Enter the desired personnel number, range or leave blank for all personnel
Type of Enrollment	Type of Benefit Enrollment	O	Select the type of enrollment using the dropdown arrow
Plan Category	Category of plan to be reported on	O	Enter category or select using the dropdown arrow
Benefit Area	Benefit Area to be reported on	R	Enter NV or select using dropdown arrow
1st Program Grouping	1st Program Grouping to be reported on	O	Enter the desired 1st program grouping or select using dropdown arrow
2nd Program Grouping	2nd Program Grouping to be reported on	O	Enter the desired 2nd program grouping or select using dropdown arrow

Plan Type	Benefit Plan type to be reported on	O	Enter the desired Plan type or select using dropdown arrow
Benefit Plan	Benefit plans for which report is to be generated	O	Enter the Benefit plan code or select using dropdown arrow, **OR** leave blank for all health plans
Period	Period start and end date	R	Enter dates for beginning and end of range
Count	How the Enrollment Statistics are to be counted, either by "Plans" or by "Persons"	R	Select either plans OR persons
Summary	Either Discrete or Cumulative Summary	R	Select either Discrete (current) or Cumulative (historical)

Select ⏲ to generate the report:

Enrollment Statistics (Discrete)

The report is generated on the screen and can be printed. If finished, select the 🔼 icon to exit the report.

☑ Personnel Action Report

Print a personnel action report using the transaction code ZHRPAR.
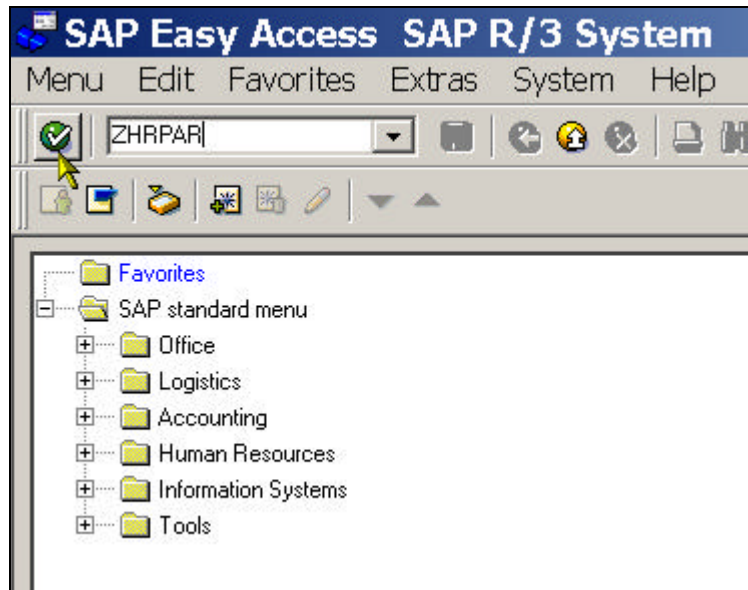
Select to go to the next screen:

HR: Personnel Action Report
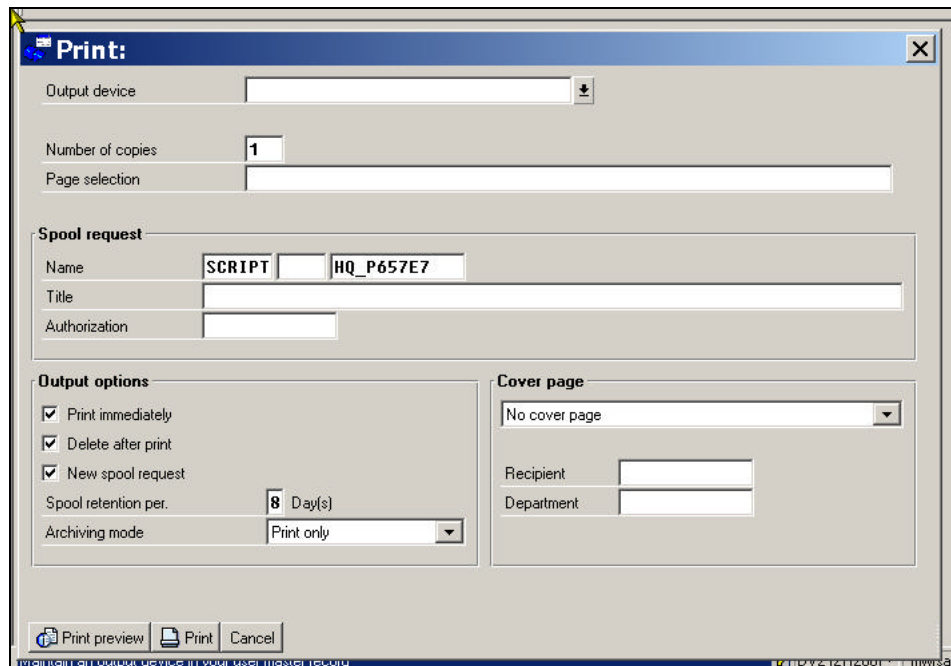
Field Name	Description	R/O/C	User Action, Values, Comments
Period	Date or dates to be reported on	R	Check "today" for today's date **OR** check today and enter a range of dates
Personnel number	Personnel number identifier	O	Enter number or range of numbers. Use the dropdown arrow if number is not known
Remarks	Remarks, NAF manager's name	O	Enter any remarks to be printed on the PAR, enter the name of the NAF manager to be printed on the PAR

Select ![icon] to generate report.

Print:

Click the dropdown arrow to select a printer, then select ![Print preview].

Be sure to email PAR to ADP payroll person before printing!

- Click on envelope icon (under the green arrow)
- Click attachment document content
- Select recipient using drop down arrow
- Select internal user and green check
- Fill in last name, first name
- Click send

Select green arrow for portrait Print Preview.

PAR: Portrait print preview

Now select the ⊟ icon to print the Personnel Action Report you selected. Select ↩

to go back to original screen. Select ↩ again to go back to SAP Easy Access screen.

☑ Request for Personnel Action (52)

Use transaction code **ZHR52**, and select [☑] to go to the next screen.
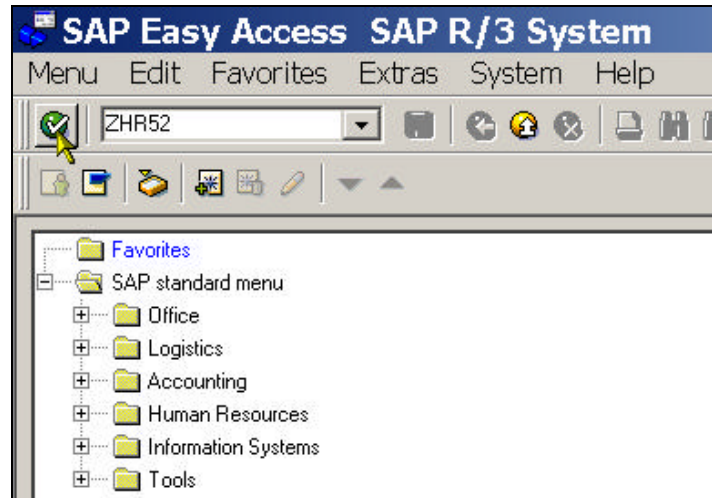
There are two ways to generate a request for personnel action:
- with personnel number

-OR-
- with position number.

Request for Personnel Action
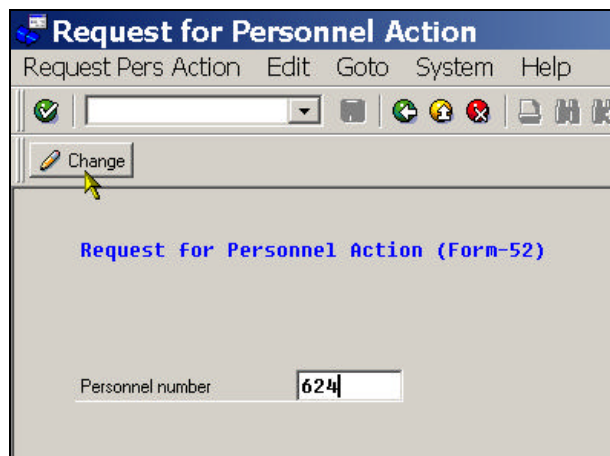
To use **personnel number**, enter it into the personnel number field, and select the
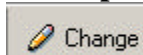
[✏ Change] icon.

Request for Personnel Action

Enter any applicable remarks to be printed on the 52. Select the 🖨 icon to continue.

Select output device, then 📇 Print preview . The 52 should look like the following illustration:

The "landscape" view appears. Select the 🔙 to get the "portrait" view.

Request for Personnel Aciton

Select the ⬚ to print.
To generate the report by position number, in the initial screen, leave personnel number

blank, then select the ⬚ Change icon.

Enter the applicable information on the next screen:

Select the 🖨 icon to print. Be sure to select 🖨 Print preview to verify entries and email before printing!

- Click on envelope icon (under the green arrow)
- Click attachment document content
- Select recipient using drop down arrow
- Select internal user and green check
- Fill in last name, first name
- Click send